

# myCalPERS Payroll Reporting

Student Guide

**April 22, 2023**



# Introduction

This guide is a resource to assist you with earned period payroll reporting. As a business partner with a retirement contract with CalPERS, you must provide and manage payroll information regularly. Payroll reports contain your employees' records that are uploaded or added manually to preprocessing areas before they can be submitted in myCalPERS. After a report is submitted for processing, all records are validated, and errors are identified to allow for corrections.

## Disclaimer

As a security safeguard, business partner and participant information has been masked within the figures in this procedure guide.

## System Access

If you are unable to process these scenarios, contact your agency's system access administrator to update your myCalPERS access.

## Training Opportunities

Prior to taking a myCalPERS training, new users should review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide and take a Business Rules class. Business Rules summarizes the laws defined by the California Public Employees' Retirement Law (PERL).

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## Unit 1: Person Search Tool

The Person Search tool provides a way to review a summary of your active employees' appointment details and position information. A new or returning employee must have an appointment with your agency in myCalPERS for payroll to be submitted for them.

### Scenario

Prior to adding a new employee's first payroll record, you will verify their appointment details.

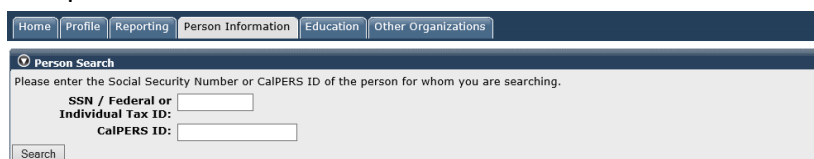
### System Logic

The Person Search tool needs to be refreshed in between searches. Clear the last employee's profile information quickly by selecting the **Person Search** left-side link.

### Step Actions

Step 1 From the homepage, select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



The screenshot shows the 'Person Search' section of the myCalPERS interface. At the top, there is a navigation bar with tabs: Home, Profile, Reporting, Person Information (selected), Education, and Other Organizations. Below the navigation bar, the 'Person Search' section is displayed. It contains a text input field for 'SSN / Federal or Individual Tax ID:' and another for 'CalPERS ID:'. A 'Search' button is located at the bottom left of the search area.

Step 3 Select the **Search** button.

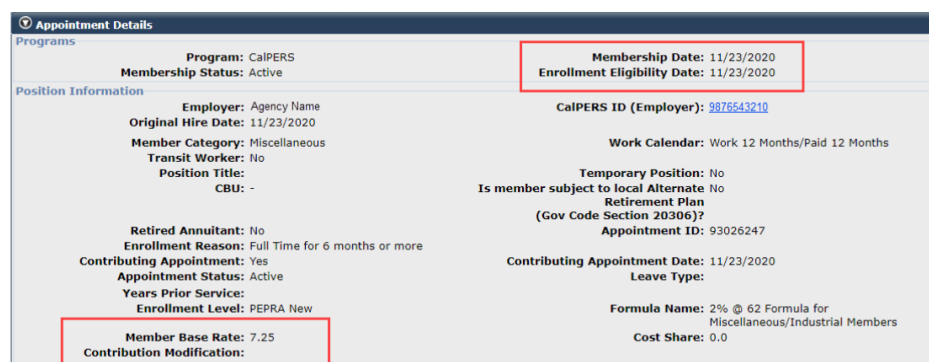
Step 4 Within the Appointment History section, select the **Employer** link that has an Active appointment status.



The screenshot shows the 'Appointment History' section. It features a table with columns: Employer, Division, Appointment Type, Position Title, Member Category, Appointment Status, Start Date, and End Date. The first row is highlighted, showing 'Agency Name' as the Employer, 'Regular' as the Appointment Type, and 'Active' as the Appointment Status. A red box highlights the 'Agency Name' link.

| Employer                    | Division | Appointment Type | Position Title | Member Category | Appointment Status | Start Date | End Date |
|-----------------------------|----------|------------------|----------------|-----------------|--------------------|------------|----------|
| <a href="#">Agency Name</a> |          | Regular          |                | Miscellaneous   | Active             | 01/06/2020 |          |

Step 5 Review your employee's appointment details, including their eligibility date and the member base rate.



The screenshot shows the 'Appointment Details' page. It is divided into two main sections: 'Programs' and 'Position Information'. The 'Programs' section shows 'Program: CalPERS' and 'Membership Status: Active'. The 'Position Information' section shows 'Employer: Agency Name' and 'Original Hire Date: 11/23/2020'. A red box highlights the 'Membership Date: 11/23/2020' and 'Enrollment Eligibility Date: 11/23/2020' in the 'Programs' section. Another red box highlights the 'Member Base Rate: 7.25' and 'Contribution Modification:' in the 'Position Information' section.

You have completed this scenario.

## Unit 2: Initiate Payroll Reporting

In this unit, you will learn how to create an earned period payroll report with myCalPERS. A payroll report is not considered complete until the report has been submitted and posted.

### Transmitting Payroll Information

This guide covers three options for transmitting payroll information through myCalPERS:

- **File Upload** – This method uses a payroll report file with data from your internal payroll system and uploads it to myCalPERS.
- **Manual Entry** – This online-data-entry method offers the ability to create a new payroll report by manually entering the necessary information for each payroll record within the report. This method is used primarily by new agencies that are reporting for the first time.
- **Copy Forward** – This online-data-entry method offers the ability to copy a previously posted earned period payroll report, make modifications to the copied records, and submit the report for the current earned period. This method is commonly used when earnings are the same (or very similar) across earned periods.

### Reporting Payroll Adjustments Records

For online-data-entry users, if you are only reporting adjustment records, create an adjustment report. Refer to the [myCalPERS Payroll Adjustments \(PDF\)](#) student guide for step actions.

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## Scenario 1: File Upload

This method allows you to upload an XML file to report your agency's payroll data through myCalPERS.

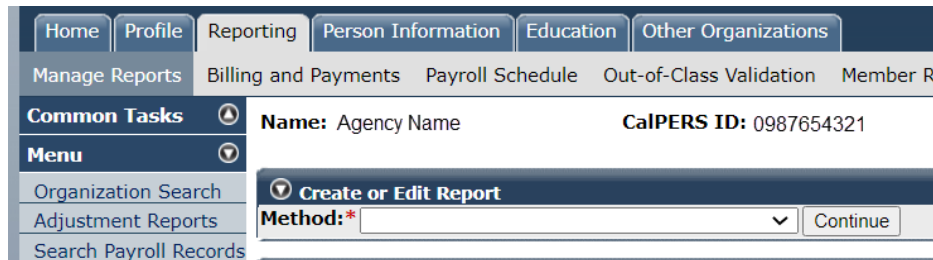
### Resources

- The [myCalPERS Technical Resources CalPERS webpage](#) is available to help you with the technical steps that are required to ensure your agency can connect to myCalPERS and submit correctly formatted files.
- If you're interested in using the file upload method, send an email to [myCalPERS System Support](mailto:employertechnicalsupport@calpers.ca.gov) at [employertechnicalsupport@calpers.ca.gov](mailto:employertechnicalsupport@calpers.ca.gov).

### Step Actions

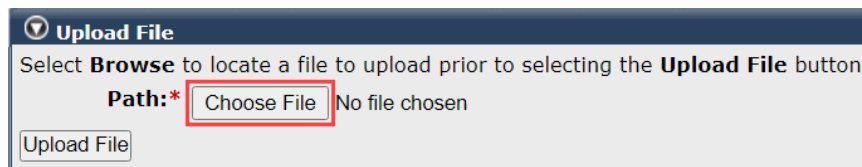
Step 1 Select the **Reporting** global navigation tab.

Step 2 Within the Create or Edit Report section, select **Upload File** from the Method drop-down list.



Step 3 Select the **Continue** button.

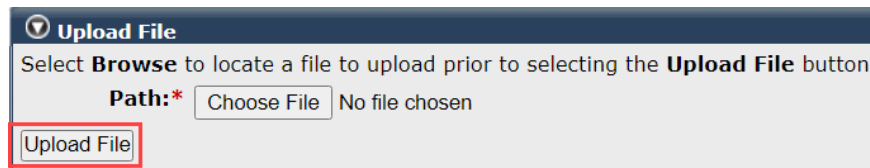
Step 4 Select the **Choose File** button in the Upload File section.



Step 5 Select the payroll file.

Step 6 Select the **Open** button.

Step 7 Select the **Upload File** button.



Step 8 Select the **View Preprocessing Areas** link at the bottom right-hand side of page.

| File Upload History  |             |             |                  |                                       |       |       |       |  |  |
|--|-------------|-------------|------------------|---------------------------------------|-------|-------|-------|--|--|
| File Type  | Upload Date | File Status | Batch Job Status | File Name                             | Valid | Error | Total |  |  |
| Payroll Reporting  | 11/02/2020  | Ready       |                  | 20200402153458_010_10006_CPRVALID.xml |       |       |       |  |  |
| Payroll Reporting  | 10/29/2020  | Accepted    | Completed        | 20201029130618_459_10006.xml          | 97    | 6     | 103   |  |  |
| 7  | 10/29/2020  | Accepted    | Completed        | 20201029122528_668_00007.xml          | 183   | 0     | 183   |  |  |
| 7  | 10/29/2020  | Accepted    | Completed        | 20201029094907_619_00007.xml          | 17    | 0     | 17    |  |  |
| Payroll Reporting  | 10/28/2020  | Accepted    | Completed        | 20201028143230_233_10006.xml          | 96    | 6     | 102   |  |  |
| 7  | 10/28/2020  | Accepted    | Completed        | 20201028094843_071_00007.xml          | 157   | 0     | 157   |  |  |
| Payroll Reporting  | 10/27/2020  | Accepted    | Completed        | 20201027135057_051_10006.xml          | 97    | 4     | 101   |  |  |
| Payroll Reporting  | 10/27/2020  | Accepted    | Completed        | 20201027120547_908_10006.xml          | 93    | 4     | 97    |  |  |
| 7  | 10/27/2020  | Accepted    | Completed        | 20201027084858_151_00007.xml          | 18    | 3     | 21    |  |  |
| Payroll Reporting  | 10/27/2020  | Accepted    | Completed        | 20201027102247_211_10006.xml          | 68    | 3     | 71    |  |  |
| Payroll Reporting  | 10/27/2020  | Accepted    | Completed        | 20201027090222_960_10006.xml          | 49    | 2     | 51    |  |  |
| 7  | 10/23/2020  | Accepted    | Completed        | 20201023150829_908_00007.xml          | 99    | 0     | 99    |  |  |
| Payroll Reporting  | 10/23/2020  | Accepted    | Completed        | 20201023124658_169_10006.xml          | 22    | 4     | 26    |  |  |
| 7  | 10/23/2020  | Accepted    | Completed        | 20201023092802_962_00007.xml          | 8     | 1     | 9     |  |  |
| Payroll Reporting  | 10/22/2020  | Accepted    | Completed        | 20201022170819_345_10006.xml          | 21    | 4     | 25    |  |  |
| Payroll Reporting  | 10/22/2020  | Accepted    | Completed        | 20201022152202_836_10006.xml          | 20    | 3     | 23    |  |  |
| Payroll Reporting  | 10/22/2020  | Accepted    | Completed        | 20201022101016_044_10006.xml          | 19    | 3     | 22    |  |  |
| Payroll Reporting  | 10/21/2020  | Accepted    | Completed        | 20201021160045_118_10006.xml          | 18    | 2     | 20    |  |  |
| 7  | 10/21/2020  | Accepted    | Completed        | 20201021152650_409_00007.xml          | 70    | 0     | 70    |  |  |
| Payroll Reporting  | 10/21/2020  | Accepted    | Completed        | 20201021145041_045_10006.xml          | 10    | 0     | 10    |  |  |
| 7  | 10/21/2020  | Accepted    | Completed        | 20201021083533_645_00007.xml          | 41    | 0     | 41    |  |  |
| Payroll Reporting  | 10/21/2020  | Accepted    | Completed        | 20201021013201_774_10006.xml          | 19472 | 0     | 19472 |  |  |
| Payroll Reporting  | 10/21/2020  | Accepted    | Completed        | 20201020235422_426_10006.xml          | 19450 | 23    | 19473 |  |  |
| Payroll Reporting  | 10/20/2020  | Accepted    | Completed        | 20201020224917_631_10006.xml          | 19450 | 23    | 19473 |  |  |
| Payroll Reporting  | 10/20/2020  | Accepted    | Completed        | 20201020220424_048_10006.xml          | 19450 | 23    | 19473 |  |  |
| Showing records 1 - 25   First << Previous 1 2 3 4 5 6 7 8 9 10 11 Next >> Last   View Max |             |             |                  |                                       |       |       |       |  |  |

[View Preprocessing Areas](#)

Step 9 Within the Preprocessing Area section, select the **Payroll Reporting** link.

| Preprocessing Area   |       |       |       |
|--|-------|-------|-------|
| Preprocessed Data  |       |       |       |
|  | Valid | Error | Total |
| Affected Subscriber List                                       | 90    | 2     | 92    |
| <a href="#">Census</a>   | -     | -     | -     |
| <a href="#">Direct Authorization</a>                           | 90    | 2     | 92    |
| Health Carrier Rate Data                                       | -     | -     | -     |
| <a href="#">Health Carrier ZIP Code Plan Relationship Data</a> | -     | -     | -     |
| <a href="#">Health Enrollment</a>                              | -     | -     | -     |
| <a href="#">Medical Group Assignment List</a>                  | -     | -     | -     |
| <a href="#">Payroll Reporting</a>                              | -     | -     | -     |
| <a href="#">Retirement Enrollment</a>                          | -     | -     | -     |

[Upload Data File](#) [View Upload History](#)

Step 10 Within the Work On Existing Payroll Reports section, select the **View Max** link at the bottom of the page to display all payroll reports.

Step 11 Sort by column header(s) to locate the appropriate report.

Step 12 Select the appropriate Earned Period/Adjustment Date link to review payroll records for the earned period.

Payroll file statuses:

- **Ready:** Prepared to go through processing in myCalPERS
- **Accepted:** Passed first level validations (formatting, required fields, etc.)
- **Rejected:** Failed the first level validations (contribution totals, payroll dates with regards to permanent separations, etc.)

Step 13 To access the records within the prior earned period report, select the **View Records** link on the bottom right-hand corner of the page.

Step 14 From the View Payroll Records page, select the **Process Report** button to process the report.

**Note:** myCalPERS will identify and flag all arrears records. Once flagged, these records cannot be edited or deleted and will be posted overnight.

Step 15 Select the **Yes** button under the Confirmation Page section to confirm the request to process the report.

**You have completed this scenario.**

## Scenario 2: Earned Period Reporting – Manual Entry

You can create a payroll report by manually entering the necessary information for each payroll record within the report. This method is primarily used by new agencies.

### New Contracting Agencies

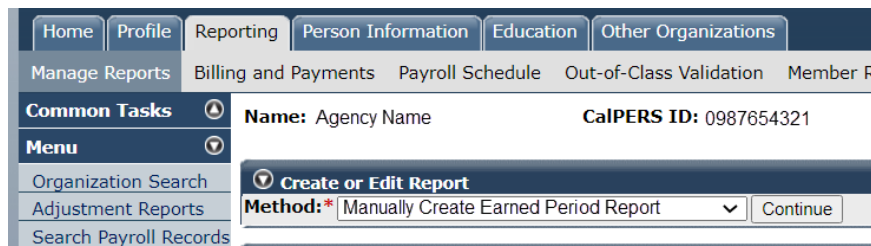
If you are a new contracting agency that needs to report payroll, you must ensure the following is in myCalPERS before reporting your earned period records:

- Your retirement contract: otherwise, you will not be able to enroll employees in CalPERS and report their payroll.
- Your agency's payroll schedule (*Monthly, Semi-monthly, Bi-weekly, or Quadra-weekly*)
- Your employees' PERS appointments with your agency

### Step Actions

Step 1 Select the **Reporting** global navigation tab.

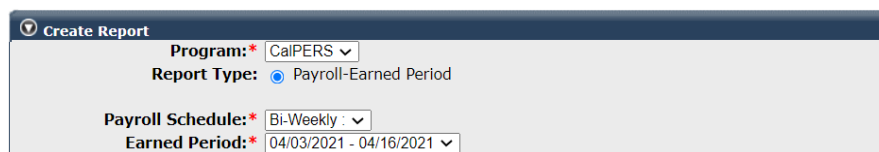
Step 2 Within the Create or Edit Report section, select the **Manually Create Earned Period Report** option from the Method drop-down list.



The screenshot shows the myCalPERS Reporting section. The top navigation bar includes tabs for Home, Profile, Reporting (selected), Person Information, Education, and Other Organizations. Below this, there are sub-tabs for Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Member R. The main content area displays the 'Create or Edit Report' form. The 'Method' dropdown menu is set to 'Manually Create Earned Period Report', and the 'Continue' button is visible.

Step 3 Select the **Continue** button.

Step 4 Complete the Create Report section.

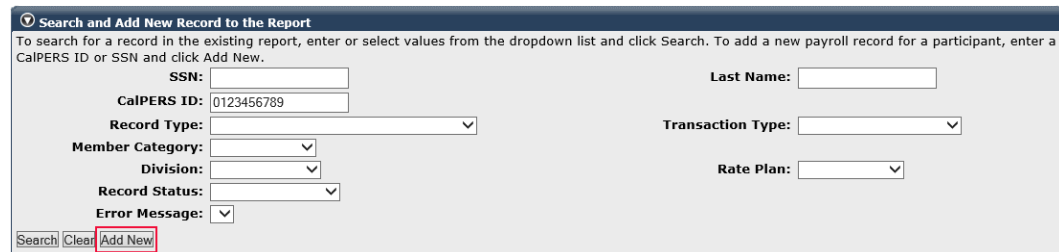


The screenshot shows the 'Create Report' form. The 'Program' dropdown is set to 'CalPERS'. The 'Report Type' radio button is selected for 'Payroll-Earned Period'. The 'Payroll Schedule' dropdown is set to 'Bi-Weekly'. The 'Earned Period' dropdown is set to '04/03/2021 - 04/16/2021'.

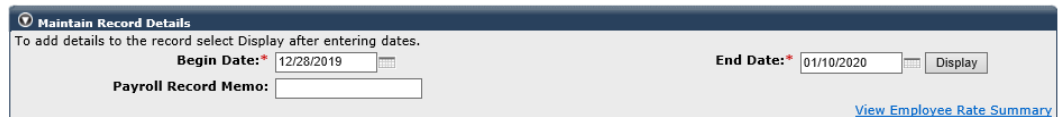
Step 5 Select the **Save & Continue** button.

Step 6 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID in the appropriate field.

Step 7 Select the **Add New** button.

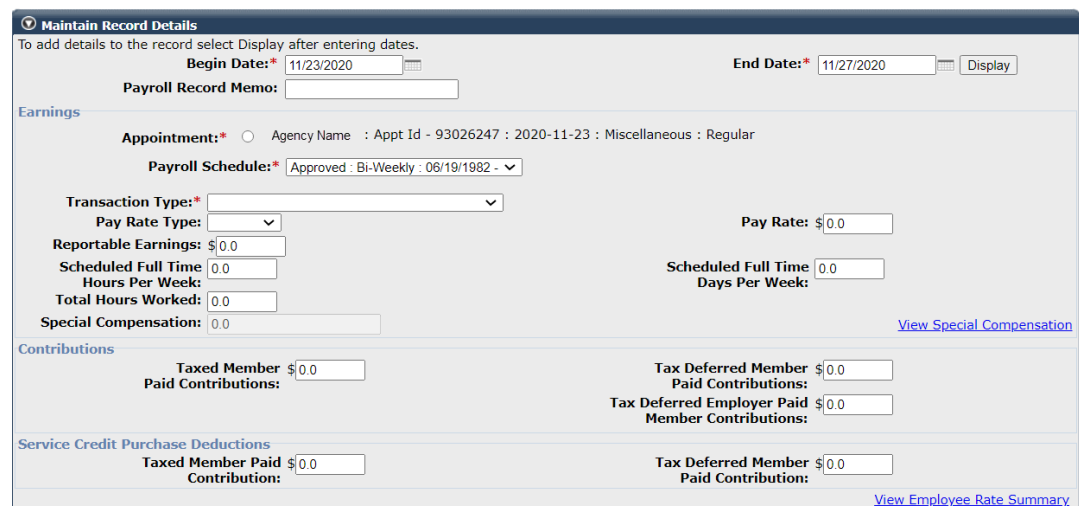


Step 8 If needed, within the Maintain Record Details section, modify the Begin and End Date fields.



Step 9 Select the **Display** button to expand the section.

Step 10 Within the Maintain Record Details section, complete the Earnings subsection.



**Note:**

- **Scheduled Full Time Days Per Week:** Report days if pay rate type is daily.
- **Scheduled Full Time Hours Per Week:** Enter the number of hours your agency considers full time for an employee in this position.
- **Total Hours Worked:** Report hours only if employee is a retired annuitant.

Step 11 Is there special compensation that needs to be added?

**Yes:** Continue to step 12

**No:** Skip to step 20

Step 12 Select the **View Special Compensation** link.



Step 13 Within the View Special Compensation section, select an **Add New** button.



[Return](#)

Step 14 Complete the Maintain Special Compensation Details section.



Step 15 Does additional special compensation need to be reported?

**Yes:** Continue to step 16

**No:** Skip to step 18

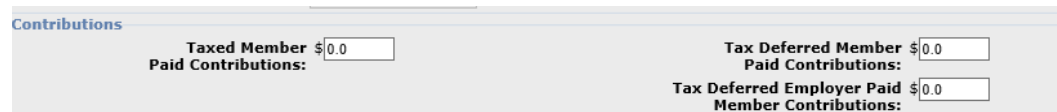
Step 16 Select the **Save and Add Another** button.

Step 17 Return to step 14.

Step 18 Select the **Save** button.

Step 19 Select the **Return** link at the bottom right.

Step 20 Within the Maintain Record Details section, Contributions subsection, report the contribution amount(s) in the appropriate field(s).



Step 21 Within the Service Credit Purchase Deductions subsection, report contribution amount(s) in the appropriate field(s) if needed.

Step 22 Select the **Save & Exit** button.

**Note:** Repeat steps 6-23 until all payroll records are in the report.

**You have completed this scenario.**

## Scenario 3: Earned Payroll Reporting – Copy Forward

You will copy forward a previously posted payroll report to create a new earned period report.

Submitting payroll records using the copy-forward method allows you to copy prior posted payroll records so you can make changes to the copied records and then submit the report for the current earned period. This method is commonly used when earnings are the same (or very similar) across earned periods.

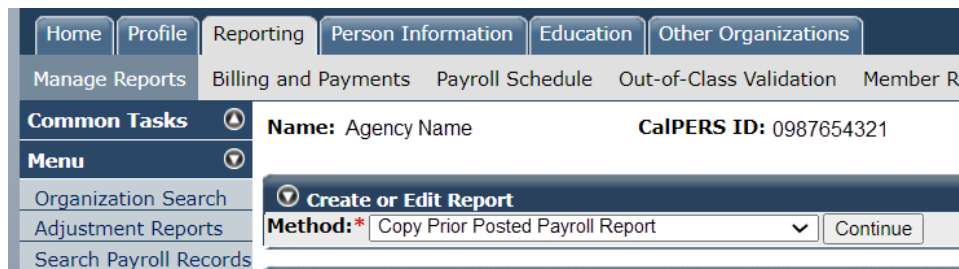
The following records that do not copy over:

- Adjustment records
- Earned Period No Contribution and No Service records – If the employee record needs to be re-reported, manually add the record to the copy-forwarded payroll report.
- Zero-payroll records (zero contributions and no special compensation)

### Step Actions

Step 1 Select the **Reporting** global navigation tab.

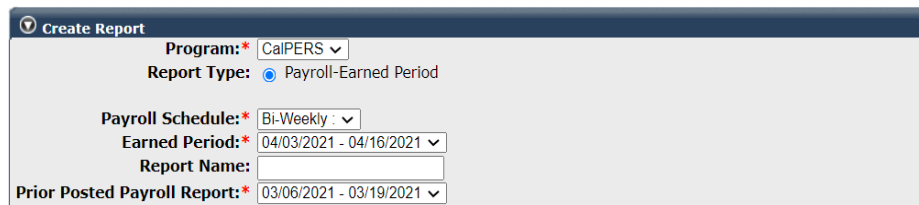
Step 2 Within the Create or Edit Report section, select **Copy Prior Posted Payroll Report** from the **Method** drop-down list.



The screenshot shows the 'Reporting' tab selected in the global navigation menu. Below the menu, the 'Common Tasks' section is expanded, showing the 'Create or Edit Report' option. The 'Method' dropdown is set to 'Copy Prior Posted Payroll Report', and the 'Continue' button is visible.

Step 3 Select the **Continue** button.

Step 4 Complete the Create Report section.



The screenshot shows the 'Create Report' form with the following fields:

- Program:** CalPERS
- Report Type:** Payroll-Earned Period
- Payroll Schedule:** Bi-Weekly
- Earned Period:** 04/03/2021 - 04/16/2021
- Report Name:** (empty field)
- Prior Posted Payroll Report:** 03/06/2021 - 03/19/2021

Step 5 Select the **Save & Continue** button.

**You have completed this scenario.**

## Unit 3: Maintaining Records Within an Earned Period Payroll Report

In this unit, you will learn how to add and modify payroll records.

CalPERS retirement benefits are funded by contributions paid by employers, members, and CalPERS investments. It is your agency's responsibility to ensure your employees' payroll is reported accurately and timely, as earned not paid, to ensure correct payment of benefits. To start a new payroll report, use unit 2 scenarios to initiate payroll reporting.

### System Logic

- When data is not reportable for a field, then that field must be left at zero (0.0).
- On the View Payroll Records page, do not use the **Apply Mass Update** link.

### Reporting Employer Paid Arrears

Report employer paid arrears in a payroll adjustment report using **Prior Period Adjustment** transaction type records. To learn more about the arrears process and how to process a payroll adjustment, refer to the [myCalPERS Employment Certification Functionality \(PDF\)](#) and the [myCalPERS Payroll Adjustments \(PDF\)](#) student guides.

### Contents

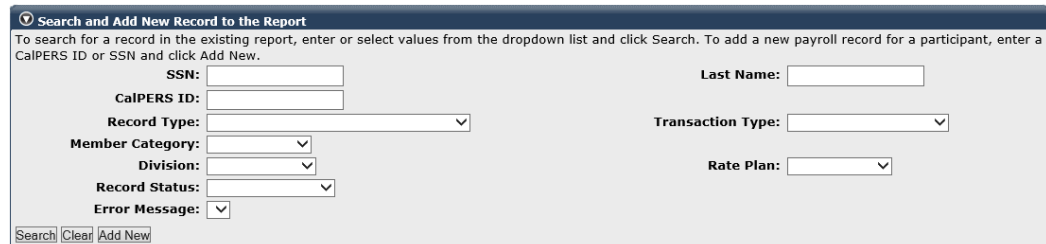
|  |    |
|--|----|
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## Scenario 1: Delete an Employee's Payroll Record

Your employee permanently separated. You will delete their payroll record because they didn't work during the current earned period.

### Step Actions

Step 1 Complete the Search and Add New Record to the Report section.



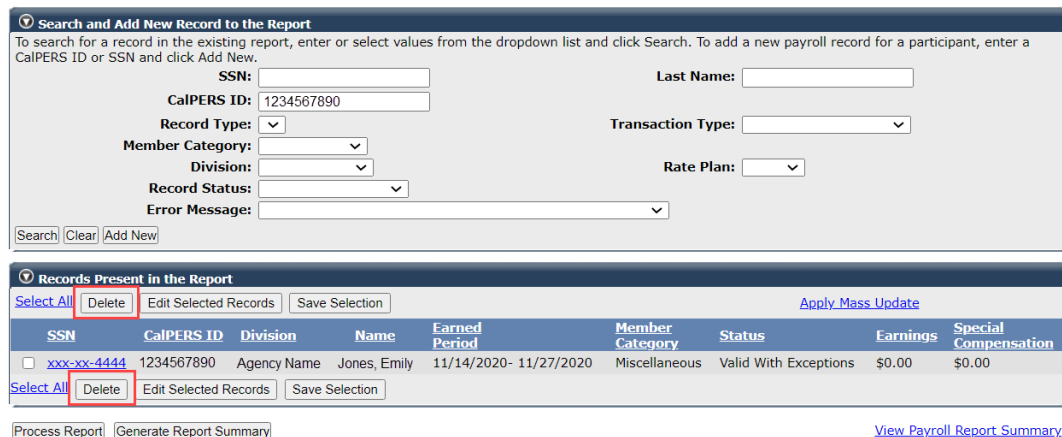
**Search and Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:  Last Name:   
CalPERS ID:  Transaction Type:   
Record Type:  Member Category:   
Division:  Rate Plan:   
Record Status:  Error Message:

Step 2 Select the **Search** button.

Step 3 Within the Records Present in the Report section, select the check box next to the **SSN** link of the employee's record you need to delete.

Step 4 Select a **Delete** button.



**Search and Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:  Last Name:   
CalPERS ID:  Transaction Type:   
Record Type:  Member Category:   
Division:  Rate Plan:   
Record Status:  Error Message:

**Records Present in the Report**  
    [Apply Mass Update](#)

| SSN  | CalPERS ID | Division    | Name         | Earned Period          | Member Category | Status                | Earnings | Special Compensation |
|--|------------|-------------|--------------|------------------------|-----------------|-----------------------|----------|----------------------|
| <input type="checkbox"/> <a href="#">xxx-xx-4444</a> | 1234567890 | Agency Name | Jones, Emily | 11/14/2020- 11/27/2020 | Miscellaneous   | Valid With Exceptions | \$0.00   | \$0.00               |

[View Payroll Report Summary](#)

Step 5 Confirm the deletion by selecting the **Yes** button.

**You have completed this scenario.**

## Scenario 2: Add a Payroll Record for a New Active Employee

You have a new employee whose PERS appointment is in myCalPERS, so you will manually enter their payroll details in your payroll report.

### Step Actions

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Add New** button.

**Search and Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:   
CalPERS ID:  0123456789  
Last Name:   
Record Type:   
Member Category:   
Division:   
Record Status:   
Transaction Type:   
Rate Plan:   
Error Message:   
Search Clear **Add New**

Step 3 If needed, within the Maintain Record Details section, modify the Begin and End Date fields.

**Maintain Record Details**  
To add details to the record select Display after entering dates.

**Begin Date:**  **End Date:**  Display  
Payroll Record Memo:   
[View Employee Rate Summary](#)

Step 4 Select the **Display** button to expand the section.

Step 5 Within the Maintain Record Details section, complete the Earnings subsection.

**Maintain Record Details**  
To add details to the record select Display after entering dates.

**Begin Date:**  **End Date:**  Display  
Payroll Record Memo:   
**Earnings**  
Appointment: ☐ Agency Name : Appt Id - 93026247 : 2020-11-23 : Miscellaneous : Regular  
Payroll Schedule:  Approved - Bi-Weekly : 06/19/1982 -   
Transaction Type:   
Pay Rate Type:   
Pay Rate:  \$0.0  
Reportable Earnings:  \$0.0  
Scheduled Full Time:  0.0  
Hours Per Week:   
Total Hours Worked:  0.0  
Special Compensation:  0.0  
[View Special Compensation](#)

#### Note:

- **Transaction Type:** If the correct transaction type is not in the drop-down list, correct the begin or end dates, then select the **Display** button.
- **Scheduled Full Time Days Per Week:** Report days if pay rate type is daily.
- **Scheduled Full Time Hours Per Week:** Enter the number of hours your agency considers full time for an employee.
- **Total Hours Worked:** Report hours if employee is a retired annuitant.
- For employees who started in the middle of the earned period, their earnings and contributions may need to be adjusted for the next earned period.

Step 6 Is there special compensation to be reported?

**Yes:** Continue to step 7


**No:** Skip to step 15

---

Step 7 Select the **View Special Compensation** link.

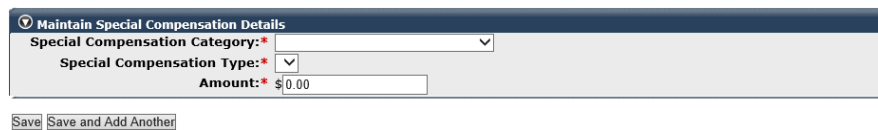
---

Step 8 Within the View Special Compensation section, select an **Add New** button.



---

Step 9 Complete the Maintain Special Compensation Details section.



---

Step 10 Does additional special compensation need to be reported?

**Yes:** Continue to step 11

**No:** Skip to step 13

---

Step 11 Select **Save and Add Another** button.

---

Step 12 Return to step 9.

---

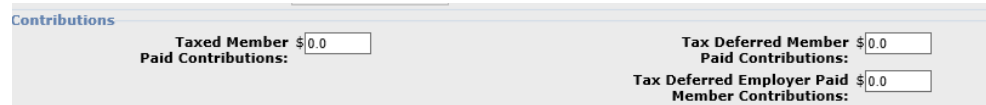
Step 13 Select the **Save** button.

---

Step 14 Select the **Return** link at bottom right.

---

Step 15 Within the Maintain Record Details section, Contributions subsection, report the contribution amount(s) in the appropriate field(s).



---

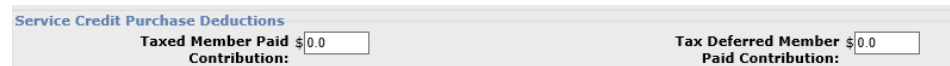
Step 16 Does a Service Credit Purchase deduction need to be reported?

**Yes:** Continue to step 17

**No:** Skip to step 18

---

Step 17 Within the Service Credit Purchase Deductions subsection, report contribution amount(s) in the appropriate field(s).



---

Step 18 Select the **Save & Exit** button.

**You have completed this scenario.**

---

## Scenario 3: Add a Payroll Record for a Non-Contributory Employee

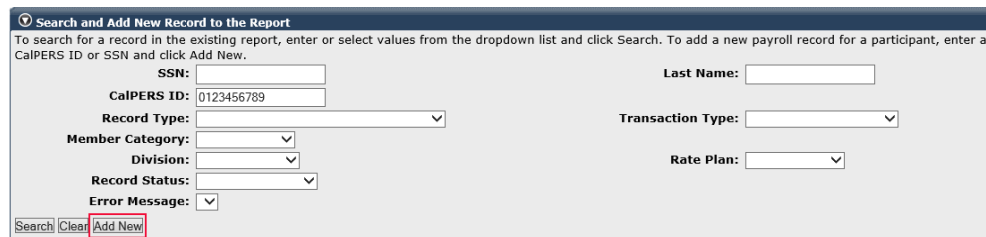
A non-contributory record is reported as an *Earned Period No Contribution and No Service* transaction type. Use this transaction type to report payroll for an employee who is:

- A retired annuitant
- A Local Alternate Retirement Plan (Gov. Code 20306) member
- Working in an overtime position. If the transaction type does not display in the drop-down list, contact CalPERS.

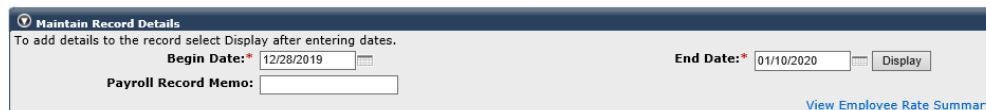
### Step Actions

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Add New** button.



Step 3 If needed, within the Maintain Record Details section, modify the Begin and End Date fields.



**Note:** If a retired annuitant's hours cross over fiscal years, report their payroll in two records (one per fiscal year).

Step 4 Select the **Display** button to expand the section.

Step 5 Within the Maintain Record Details section, complete the Earnings subsection.



**Note:**

- **Scheduled Full Time Days Per Week:** Report days if pay rate type is daily.
- **Scheduled Full Time Hours Per Week:** Enter the number of hours your agency considers full time for an employee.
- **Total Hours Worked:** Report hours only if employee is a retired annuitant.

Step 6 Is there special compensation to be reported?

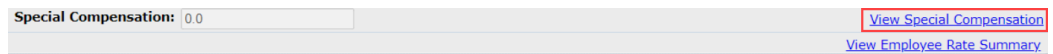
**Yes:** Continue to step 7

**No:** Skip to step 15

**Note:** Do not report special compensation for retired annuitants unless they are in the earnings-limit program approved by CalPERS.

---

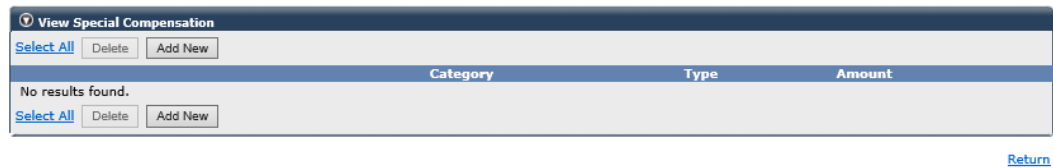
Step 7 Select the View Special Compensation link.



Special Compensation: 0.0 [View Special Compensation](#)  
[View Employee Rate Summary](#)

---

Step 8 Within the View Special Compensation section, select an **Add New** button.



**View Special Compensation**  
[Select All](#) [Delete](#) [Add New](#)

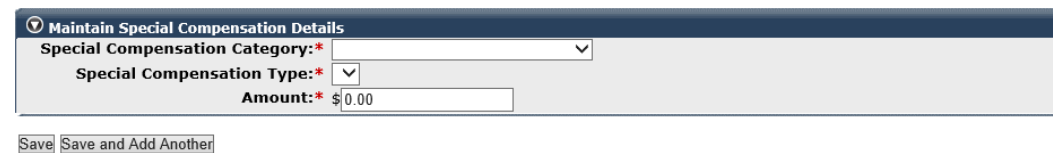
| Category          | Type | Amount |
|-------------------|------|--------|
| No results found. |      |        |

[Select All](#) [Delete](#) [Add New](#)

[Return](#)

---

Step 9 Complete the Maintain Special Compensation Details section.



**Maintain Special Compensation Details**  
Special Compensation Category:\*   
Special Compensation Type:\*   
Amount:\* \$0.00

[Save](#) [Save and Add Another](#)

---

Step 10 Is there additional special compensation to be reported?

**Yes:** Continue to step 11

**No:** Skip to step 13

---

Step 11 Select **Save and Add Another** button.

---

Step 12 Return to step 9.

---

Step 13 Select the **Save** button.

---

Step 14 Select the **Return** link at bottom right.

---

Step 15 Select the **Save & Exit** button.

**You have completed this scenario.**

---



## Scenario 4: Report a Zero-Payroll Record

You may report a zero-payroll record for both contributory and non-contributory employees who do not work the earned period. The benefit of this is that you won't need to confirm no payroll on the Retirement Appointment Reconciliation or Payroll Schedule pages later.

### System Logic

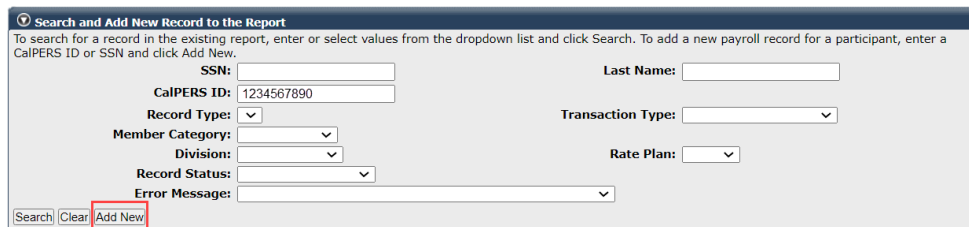
- Zero-payroll records do not copy forward. You must enter your zero-payroll records manually for each earned period they do not work.
- Zero-payroll records will have the transaction status of Valid With Exceptions.
- Employees with no payroll reported for 6 months or more will be permanently separated by the system.

### Step Actions

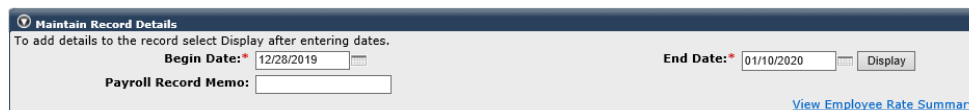
Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Search** button.

Step 3 If no results are found, select the **Add New** button to add a new record.



Step 4 If needed, within the Maintain Record Details section, modify the Begin and End Date fields.



Step 5 Select the **Display** button to expand the section.

Step 6 Within the Maintain Record Details section, complete the Earnings subsection.



**Note:** Pay Rate Type field must be 0.0.

Step 7 Is there special compensation that needs to be deleted?

**Yes:** Continue to step 8

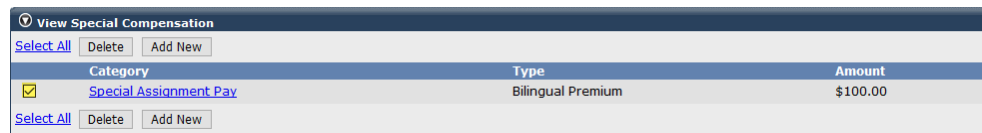
**No:** Skip to step 12

---

Step 8 Select the **View Special Compensation** link.

---

Step 9 Select the Special Compensation check box(es).



| Category   | Type              | Amount   |
|--|-------------------|----------|
| <input checked="" type="checkbox"/> Special Assignment Pay | Bilingual Premium | \$100.00 |

**Note:** Special compensation should be deleted and not reported as a 0 amount.

---

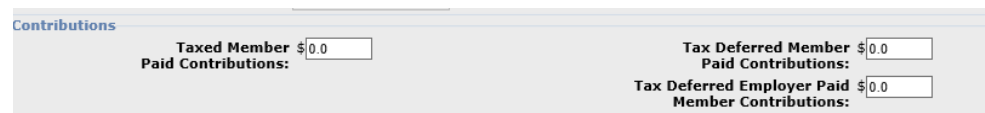
Step 10 Select a **Delete** button.

---

Step 11 Select the **Return** link at bottom right.

---

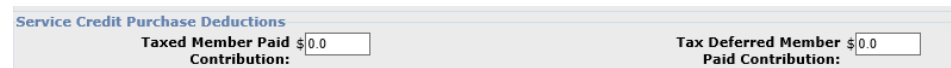
Step 12 Within the Maintain Record Details section, Contributions subsection, report zero (0) contribution amounts.



|                                  |        |  |        |
|----------------------------------|--------|--|--------|
| Taxed Member Paid Contributions: | \$0.00 | Tax Deferred Member Paid Contributions:          | \$0.00 |
|                                  |        | Tax Deferred Employer Paid Member Contributions: | \$0.00 |

---

Step 13 In the Service Credit Purchase Deductions subsection, report zero (0) contribution amounts.



|                                 |        |  |        |
|---------------------------------|--------|--|--------|
| Taxed Member Paid Contribution: | \$0.00 | Tax Deferred Member Paid Contribution: | \$0.00 |
|---------------------------------|--------|--|--------|

---

Step 14 Select the **Save & Exit** button.

**You have completed this scenario.**

---

## Scenario 5: Modify Payroll Record Due to Permanent Separation

When an employee's permanent separation or leave of absence is in the middle of the earned period, their earned period record (*end date, reportable earnings, and contributions*) must be modified.

### Step Actions

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you need to modify.

| SSN                         | CalPERS ID | Division    | Name         | Earned Period           | Member Category | Status                | Earnings | Special Compensation |
|-----------------------------|------------|-------------|--------------|-------------------------|-----------------|-----------------------|----------|----------------------|
| <a href="#">xxx-xx-4444</a> | 1234567890 | Agency Name | Jones, Emily | 11/14/2020 - 11/27/2020 | Miscellaneous   | Valid With Exceptions | \$0.00   | \$0.00               |

[Select All](#) [Delete](#) [Edit Selected Records](#) [Save Selection](#) [Apply Mass Update](#)

[Process Report](#) [Generate Report Summary](#) [View Payroll Report Summary](#)

Step 4 Within the Maintain Record Details section, modify the **End Date** field.

**Maintain Record Details**  
To add details to the record select Display after entering dates.

Begin Date: 11/23/2020

End Date: 11/27/2020 [Display](#)

Payroll Record Memo:

Step 5 Select the **Display** button.

Step 6 Within the Maintain Record Details section, modify the reportable earnings.

**Maintain Record Details**  
To add details to the record select Display after entering dates.

Begin Date: 11/23/2020

End Date: 11/27/2020 [Display](#)

Payroll Record Memo:

**Earnings**

Appointment: ☐ Agency Name : Appt Id - 93026247 : 2020-11-23 : Miscellaneous : Regular

Payroll Schedule:  Approved : Bi-Weekly : 06/19/1982 -

Transaction Type:

Pay Rate Type:

Pay Rate: \$0.00

Reportable Earnings: \$0.00

Scheduled Full Time: 0.00

Hours Per Week: 0.00

Total Hours Worked: 0.00

Special Compensation: 0.00

[View Special Compensation](#)

**Contributions**

Taxed Member Paid Contributions: \$0.00

Tax Deferred Member Paid Contributions: \$0.00

Tax Deferred Employer Paid Member Contributions: \$0.00

**Service Credit Purchase Deductions**

Taxed Member Paid Contribution: \$0.00

Tax Deferred Member Paid Contribution: \$0.00

[View Employee Rate Summary](#)

Step 7 Is there special compensation that needs to be added or modified?

**Yes:** Continue to step 8

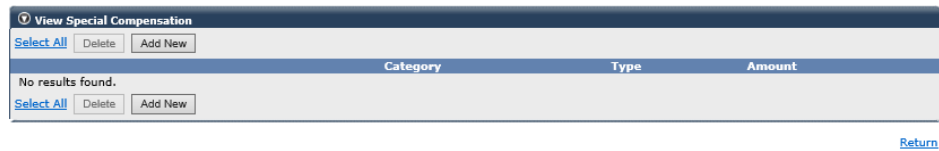
**No:** Skip to step 16

Step 8 Select the **View Special Compensation** link.

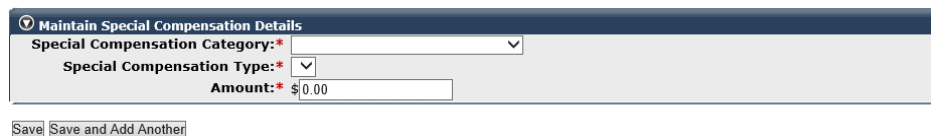
Step 9 Does a special compensation item need to be modified?

**Yes:** Within the View Special Compensation section, select the **Special Compensation Category** link to modify the item

**No:** Within the View Special Compensation section, select an **Add New** button



Step 10 Complete the Maintain Special Compensation Details section.



Step 11 Does additional special compensation need to be reported?

**Yes:** Continue to step 12

**No:** Skip to step 14

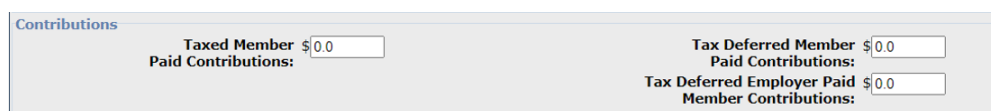
Step 12 Select **Save and Add Another** button.

Step 13 Return to step 10.

Step 14 Select the **Save** button.

Step 15 Select the **Return** link at bottom right.

Step 16 Within the Maintain Record Details section, Contributions subsection, report the contribution amount(s) in the appropriate field(s).

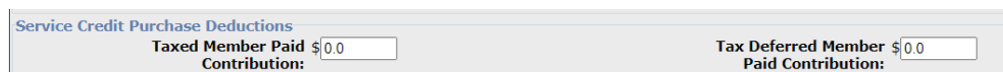


Step 17 Are there service credit purchase deductions to be reported?

**Yes:** Continue to step 18

**No:** Skip to step 19

Step 18 In the Service Credit Purchase Deductions subsection, add or modify the contribution(s).



Step 19 Select the **Save & Exit** button.

**You have completed this scenario.**

## Scenario 6: Modify a Payroll Record with a Pay Rate Increase

Your employee received a pay raise effective the beginning of the earned period. You will modify the employee's earned period payroll record to reflect the:

- New pay rate
- Increased reportable earnings
- Increased contributions for contributory employees

### Why is Pay Rate Important?

When an employee retires, their retirement benefit is calculated using a formula that includes years of service credit, age at retirement, and final compensation. Service credit and final compensation must be reported accurately to ensure the employee retires without delay and receives the correct retirement allowance.

### Step Actions

**Step 1** Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID in the appropriate field.

**Step 2** Select the **Search** button.

**Step 3** Select the **SSN** link next to the employee's record you need to modify.

The screenshot shows the 'Search and Add New Record to the Report' form. The form has fields for SSN, CalPERS ID, Last Name, Record Type, Member Category, Division, Transaction Type, Record Status, and Rate Plan. Below the form is a table titled 'Records Present in the Report'.

| SSN                         | CalPERS ID | Division    | Name         | Earned Period           | Member Category | Status                | Earnings | Special Compensation |
|-----------------------------|------------|-------------|--------------|-------------------------|-----------------|-----------------------|----------|----------------------|
| <a href="#">xxx-xx-4444</a> | 1234567890 | Agency Name | Jones, Emily | 11/14/2020 - 11/27/2020 | Miscellaneous   | Valid With Exceptions | \$0.00   | \$0.00               |

Below the table are links for 'Process Report', 'Generate Report Summary', and 'View Payroll Report Summary'.

**Step 4** Within the Maintain Record Details section, Earnings subsection, modify the Pay Rate and Reportable Earnings fields.

The screenshot shows the 'Maintain Record Details' form, Earnings subsection. The form has fields for Begin Date, End Date, Payroll Record Memo, Reported Name and CalPERS ID, Last Name, First Name, Middle Name, Appointment, Payroll Schedule, Transaction Type, Pay Rate Type, Reportable Earnings, Scheduled Full Time, Hours Per Week, Total Hours Worked, Special Compensation, Taxed Member Paid Contributions, Tax Deferred Member Paid Contributions, Tax Deferred Employer Paid Member Contributions, and Service Credit Purchase Deductions. The 'Reportable Earnings' and 'Pay Rate' fields are highlighted with red boxes.

Step 5 Is there special compensation that needs to be added or modified?

**Yes:** Continue to step 6

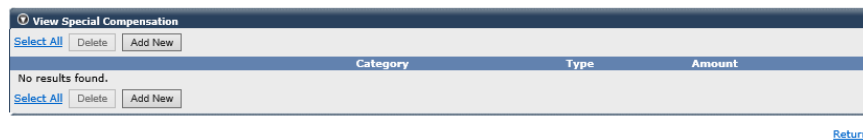
**No:** Skip to step 14

Step 6 Select the **View Special Compensation** link.

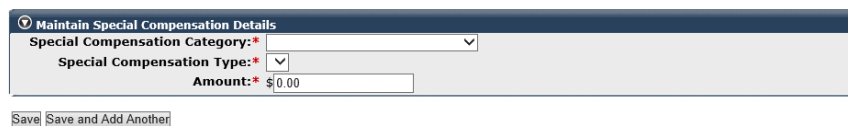
Step 7 Does a special compensation item need to be modified?

**Yes:** Within the View Special Compensation section, select the **Special Compensation Category** link to modify the item

**No:** Within the View Special Compensation section, select an **Add New** button



Step 8 Complete the Maintain Special Compensation Details section.



Step 9 Is there additional special compensation to be reported?

**Yes:** Continue to step 10

**No:** Skip to step 12

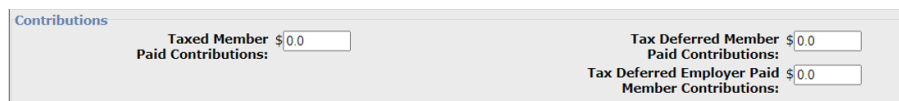
Step 10 Select **Save and Add Another** button.

Step 11 Return to step 8.

Step 12 Select the **Save** button.

Step 13 Select the **Return** link at the bottom right.

Step 14 Within the Contributions subsection, report the contribution amount(s).

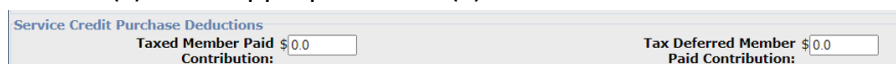


Step 15 Are there service credit purchase deductions to be reported?

**Yes:** Continue to step 16

**No:** Skip to step 17

Step 16 Within the Service Credit Purchase Deductions section, report contribution amount(s) in the appropriate field(s).



Step 17 Select the **Save & Exit** button.

**You have completed this scenario.**

## Scenario 7: Modify and Add a Payroll Record with a Mid-Earned Period Pay Rate Increase

Two earned payroll records will need to be submitted when there is a mid-earned period pay rate increase.

- First, modify the existing earned period record by changing the end date to the day before the pay rate increase, and then change the earnings and contributions that were earned within these dates.
- Next, add a second payroll record reflecting the first day of the pay rate increase with the end date as the last day of the earned period. The new pay rate, earnings, and contributions will need to reflect what was earned within these dates.

**Note:** Both records will copy forward to the next earned period report. Before processing the payroll report, delete the record with the old pay rate and modify the earnings and contributions for the other/new pay rate record if the employee works the full earned period.

### Step Actions

#### Modify Existing Record

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you wish to modify.

The screenshot shows the 'Search and Add New Record to the Report' form. It includes fields for SSN, CalPERS ID, Last Name, Record Type, Member Category, Division, Transaction Type, Record Status, Rate Plan, and an Error Message field. Below the form is a table titled 'Records Present in the Report' with columns: SSN, CalPERS ID, Division, Name, Earned Period, Member Category, Status, Earnings, and Special Compensation. The table contains one record with SSN 'xxx-xx-4444' highlighted. Below the table are buttons for 'Process Report' and 'Generate Report Summary', and a link for 'View Payroll Report Summary'.

| SSN                         | CalPERS ID | Division    | Name         | Earned Period           | Member Category | Status                | Earnings | Special Compensation |
|-----------------------------|------------|-------------|--------------|-------------------------|-----------------|-----------------------|----------|----------------------|
| <a href="#">xxx-xx-4444</a> | 1234567890 | Agency Name | Jones, Emily | 11/14/2020 - 11/27/2020 | Miscellaneous   | Valid With Exceptions | \$0.00   | \$0.00               |

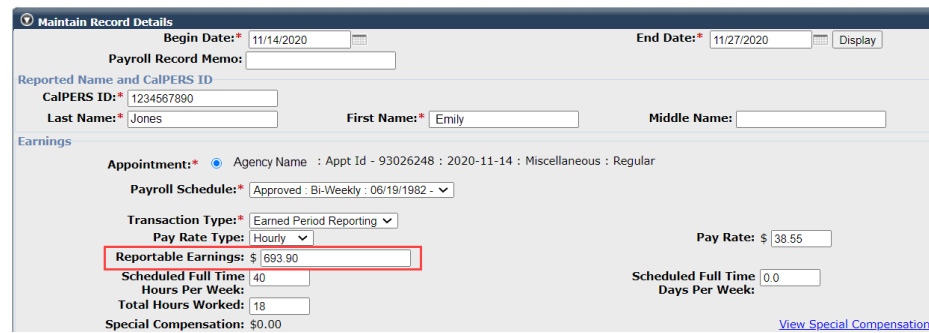
Step 4 Within the Maintain Record Details section, modify the **End Date** field to the last day prior to the pay rate increase.

The screenshot shows the 'Maintain Record Details' form. It includes fields for Begin Date, End Date, and Payroll Record Memo. The End Date field is highlighted with a red box and contains the date 11/27/2020. There is a 'Display' button next to the End Date field.

Step 5 Select the **Display** button.

---

Step 6 In the Maintain Record Details section, modify the Reportable Earnings field.



Step 7 Is there special compensation that needs to be added or modified?

**Yes:** Continue to step 8

**No:** Skip to step 16

---

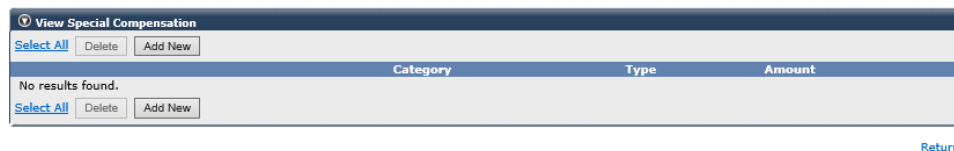
Step 8 Select the **View Special Compensation** link.

---

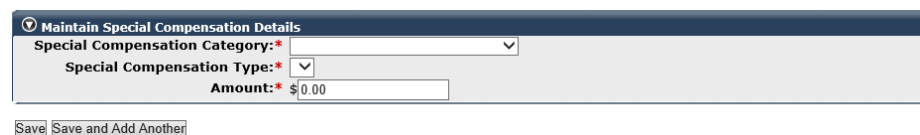
Step 9 Does a special compensation item need to be modified?

**Yes:** Within the View Special Compensation section, select the **Special Compensation Category** link to modify the item

**No:** Within the View Special Compensation section, select an **Add New** button



Step 10 Complete the Maintain Special Compensation Details section.



Step 11 Does additional special compensation need to be reported?

**Yes:** Continue to step 12

**No:** Skip to step 14

---

Step 12 Select **Save and Add Another** button.

---

Step 13 Return to step 10.

---

Step 14 Select the **Save** button.

---

Step 15 Select the **Return** link at the bottom right.

---



Step 16 Within the Maintain Record Details section, Contributions subsection, report the contribution amount(s) in the appropriate field(s).

**Contributions**

Taxed Member Paid Contributions: \$0.0

Tax Deferred Member Paid Contributions: \$0.0

Tax Deferred Employer Paid Member Contributions: \$0.0

Step 17 Are there service credit purchase deductions to be reported?

**Yes:** Continue to step 18

**No:** Skip to step 19

Step 18 Within the Service Credit Purchase Deductions subsection, report contribution amount(s) in the appropriate field(s).

**Service Credit Purchase Deductions**

Taxed Member Paid Contribution: \$0.0

Tax Deferred Member Paid Contribution: \$0.0

Step 19 Select the **Save & Continue** button.

#### Add Second Payroll Record Reflecting New Pay Rate

Step 20 Within the Search and Add New Record to the Report section, select the **Add New** button.

**Search and Add New Record to the Report**

To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:

CalPERS ID:

Last Name:

Record Type:

Member Category:

Division:

Record Status:

Transaction Type:

Error Message:

Step 21 Within the Maintain Record Details section, modify the **Begin Date** field to the first day of the pay increase.

**Maintain Record Details**

To add details to the record select Display after entering dates.

Begin Date:

End Date:

Payroll Record Memo:

[View Employee Rate Summary](#)

Step 22 Select the **Display** button.

## Step 23

Complete the Maintain Record Details section.

**Maintain Record Details**  
To add details to the record select Display after entering dates.

**Begin Date:** 11/23/2020 **End Date:** 11/27/2020 **Display**

**Payroll Record Memo:**

**Earnings**

**Appointment:** Agency Name : Appt Id - 93026247 : 2020-11-23 : Miscellaneous : Regular

**Payroll Schedule:** Approved - Bi-Weekly : 06/19/1982

**Transaction Type:** **Pay Rate Type:** **Pay Rate:** \$0.0

**Reportable Earnings:** \$0.0 **Scheduled Full Time Days Per Week:** 0.0

**Scheduled Full Time Hours Per Week:** 0.0 **Total Hours Worked:** 0.0

**Special Compensation:** 0.0 [View Special Compensation](#)

**Contributions**

**Taxed Member Paid Contributions:** \$0.0 **Tax Deferred Member Paid Contributions:** \$0.0

**Tax Deferred Employer Paid Member Contributions:** \$0.0

**Service Credit Purchase Deductions**

**Taxed Member Paid Contribution:** \$0.0 **Tax Deferred Member Paid Contribution:** \$0.0 [View Employee Rate Summary](#)

**Note:**

- **Scheduled Full Time Days Per Week:** Modify if pay rate type is daily
- **Scheduled Full Time Hours Per Week:** The number of hours your agency considers full time for an employee
- **Total Hours Worked:** Add only if employee is a retired annuitant

## Step 24

Is there special compensation that needs to be added?

**Yes:** Continue to step 25**No:** Skip to step 31

## Step 25

Select the **View Special Compensation** link.

## Step 26

Within the View Special Compensation section, select an **Add New** button.

**View Special Compensation**

[Select All](#) [Delete](#) [Add New](#)

| Category          | Type | Amount |
|-------------------|------|--------|
| No results found. |      |        |

[Select All](#) [Delete](#) [Add New](#)

[Return](#)

## Step 27

Complete the Maintain Special Compensation Details section.

**Maintain Special Compensation Details**

**Special Compensation Category:** **Special Compensation Type:** **Amount:** \$0.00

[Save](#) [Save and Add Another](#)

## Step 28

Does an additional special compensation need to be reported?

**Yes:** Continue to step 29**No:** Skip to step 31

## Step 29

Select **Save and Add Another** button.

Step 30 Return to step 27.

---

Step 31 Select the **Save** button.

---

Step 32 Select the **Return** link at the bottom right.

---

Step 33 Enter the contributions within the Contributions subsection.

|  |  |
|--|--|
| <b>Contributions</b>                   |  |
| Taxed Member Paid Contributions: \$0.0 | Tax Deferred Member Paid Contributions: \$0.0          |
|  | Tax Deferred Employer Paid Member Contributions: \$0.0 |

---

Step 34 Are there service credit purchase deductions to be reported?

**Yes:** Continue to step 35

**No:** Skip to step 36

---

Step 35 Within the Service Credit Purchase Deductions subsection, report the contribution amount(s) in the appropriate field(s).

|   |  |
|---|--|
| <b>Service Credit Purchase Deductions</b> |  |
| Taxed Member Paid Contribution: \$0.0     | Tax Deferred Member Paid Contribution: \$0.0 |

---

Step 36 Select the **Save & Exit** button.

**You have completed this scenario.**

---

## Scenario 8: Modify a Payroll Record to Add Special Compensation

You will add special compensation to an employee's payroll record.

### System Logic

When reporting special compensation, your agency must:

- Verify the special compensation is reportable
- Identify the amount, type, and category of special compensation
- Report for the pay period when the special compensation was earned, regardless of when it was paid

### Step Actions

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you wish to modify.

The screenshot shows two parts of a web application. The top part is a form titled "Search and Add New Record to the Report". It contains fields for SSN, CalPERS ID, Last Name, Record Type, Member Category, Division, Transaction Type, Rate Plan, and Record Status. There are "Search", "Clear", and "Add New" buttons at the bottom. The bottom part is a table titled "Records Present in the Report". It has columns for SSN, CalPERS ID, Division, Name, Earned Period, Member Category, Status, Earnings, and Special Compensation. A single record is shown with SSN "xxx-xx-4444", CalPERS ID "1234567890", and Special Compensation "\$0.00". Below the table are buttons for "Process Report", "Generate Report Summary", and a link for "View Payroll Report Summary".

| SSN                         | CalPERS ID | Division    | Name         | Earned Period           | Member Category | Status                | Earnings | Special Compensation |
|-----------------------------|------------|-------------|--------------|-------------------------|-----------------|-----------------------|----------|----------------------|
| <a href="#">xxx-xx-4444</a> | 1234567890 | Agency Name | Jones, Emily | 11/14/2020 - 11/27/2020 | Miscellaneous   | Valid With Exceptions | \$0.00   | \$0.00               |

Step 4 Within the Maintain Record Details section, modify the Begin and End Date fields.

The screenshot shows a form titled "Maintain Record Details". It has fields for "Begin Date" and "End Date", both with calendar icons. There is a "Display" button. Below these fields is a "Payroll Record Memo" field. At the bottom right is a link for "View Employee Rate Summary".

Step 5 Within the Maintain Record Details section, select the **View Special Compensation** link.

The screenshot shows the "Earnings" section of the "Maintain Record Details" form. It contains fields for Appointment, Payroll Schedule, Transaction Type, Pay Rate Type, Reportable Earnings, Scheduled Full Time, Total Hours Worked, and Special Compensation. There is a "View Special Compensation" link at the bottom right.

| Appointment   | Payroll Schedule                    | Transaction Type        | Pay Rate Type | Reportable Earnings | Scheduled Full Time | Total Hours Worked | Special Compensation |
|---|-------------------------------------|-------------------------|---------------|---------------------|---------------------|--------------------|----------------------|
| Agency Name : Appt Id - 93026248 : 2020-11-14 : Miscellaneous : Regular | Approved : Bi-Weekly : 06/19/1982 - | Earned Period Reporting | Hourly        | \$ 693.90           | 40                  | 18                 | \$0.00               |

Step 6 Within the View Special Compensation section, select an **Add New** button.

| Category          | Type | Amount |
|-------------------|------|--------|
| No results found. |      |        |

Step 7 Complete the Maintain Special Compensation Details section.

Special Compensation Category: \*  
Special Compensation Type: \*  
Amount: \* \$0.00

Step 8 Is there additional special compensation to be reported?

**Yes:** Continue to step 9

**No:** Skip to step 11

Step 9 Select **Save and Add Another** button.

Step 10 Return to step 7.

Step 11 Select the **Save** button.

Step 12 Select the **Return** link.

| Category      | Type          | Amount   |
|---------------|---------------|----------|
| Incentive Pay | Longevity Pay | \$100.00 |

Step 13 Within the Maintain Record Details section, Contributions subsection, report the contribution amount(s) in the appropriate field(s).

Taxed Member Paid Contributions: \$0.00  
Tax Deferred Member Paid Contributions: \$0.00

Step 14 Are there service credit purchase deductions to be reported?

**Yes:** Continue to step 15

**No:** Skip to step 16

Step 15 Add or modify the contributions in the Service Credit Purchase Deductions subsection.

Taxed Member Paid Contribution: \$0.00  
Tax Deferred Member Paid Contribution: \$0.00

Step 16 Select the **Save & Exit** button.

**You have completed this scenario.**

## Scenario 9: Reporting Payroll When an Employee Has Reached the Compensation Limit

CalPERS notifies all employers of the new limits each year in a Circular Letter. myCalPERS tracks the reportable compensation and will display an exception message as your employee approaches the limit and will display an error once an employee has reached the annual compensation limit for the calendar year.

- The compensation limit does not limit the salary an employer can pay an employee, but it impacts how your agency reports this information to CalPERS.
- Once the compensation limit has been reached, any compensation over the limit must be reported to CalPERS without member contributions.
- Track your employee's compensation limit throughout the calendar year by running the Reported Compensation by Calendar Year Summary Report.

To submit payroll for an employee who reaches the compensation limit:

- First, you will modify the earned period record to reflect the compensation up to the limit and its contributions.
- Second, add another record in the same payroll report with the remaining reportable earnings that are over the limit without contributions.

### Step Actions

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you wish to modify.

The screenshot displays the myCalPERS interface. The top section, titled "Search and Add New Record to the Report", contains search criteria fields: SSN, CalPERS ID (1234567890), Last Name, Record Type, Member Category, Division, Transaction Type, Rate Plan, Record Status, and Error Message. Below these fields are buttons for "Search", "Clear", and "Add New".

The bottom section, titled "Records Present in the Report", includes buttons for "Select All", "Delete", "Edit Selected Records", "Save Selection", and "Apply Mass Update". It contains a table with the following data:

| SSN                         | CalPERS ID | Division    | Name         | Earned Period          | Member Category | Status                | Earnings | Special Compensation |
|-----------------------------|------------|-------------|--------------|------------------------|-----------------|-----------------------|----------|----------------------|
| <a href="#">xxx-xx-4444</a> | 1234567890 | Agency Name | Jones, Emily | 11/14/2020- 11/27/2020 | Miscellaneous   | Valid With Exceptions | \$0.00   | \$0.00               |

Below the table are buttons for "Select All", "Delete", "Edit Selected Records", and "Save Selection". At the bottom of the interface are buttons for "Process Report" and "Generate Report Summary", and a link for "View Payroll Report Summary".

Step 4 Within the Record Details section, adjust the reportable earnings and special compensation to the compensation limit.

**Maintain Record Details**  
Begin Date: 11/14/2020 End Date: 11/27/2020 Display  
Payroll Record Memo:  
Reported Name and CalPERS ID  
CalPERS ID: 1234567890  
Last Name: Jones First Name: Emily Middle Name:  
Earnings  
Appointment: Agency Name : Appt Id - 93026248 : 2020-11-14 : Miscellaneous : Regular  
Payroll Schedule: Approved - Bi-Weekly : 06/19/1982 -  
Transaction Type: Earned Period Reporting  
Pay Rate Type: Hourly Pay Rate: \$ 38.55  
Reportable Earnings: \$ 693.90  
Scheduled Full Time: 40  
Hours Per Week: 18  
Total Hours Worked: 18  
Special Compensation: \$0.00 View Special Compensation  
Contributions  
Taxed Member Paid Contributions: \$ 0.00  
Tax Deferred Member Paid Contributions: \$ 0.00  
Tax Deferred Employer Paid Member Contributions: \$ 0.00  
Service Credit Purchase Deductions  
Taxed Member Paid Contribution: \$ 0.00  
Tax Deferred Member Paid Contribution: \$ 0.00  
Return to View Records page View Employee Rate Summary

**Note:** An error will occur if an earned period record includes compensation with contributions over the Internal Revenue Code limit.

Step 5 Report contributions on the compensation for this record.

Step 6 Select the **Save & Continue** button.

## Second Record

Step 6 Within the same earned period report, in the Search a Record in the Report section, enter the employee's SSN or CalPERS ID in the appropriate field.

Step 7 Within the Search and Add New Record to the Report section, select the **Add New** button.

**Search and Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.  
SSN: CalPERS ID: 1234567890 Last Name:  
Record Type: Member Category: Transaction Type:  
Division: Rate Plan:  
Record Status: Error Message:  
Search Clear Add New

Step 8 Within the Maintain Records Details section, enter the entire earned period dates in which the employee reached the compensation limit.

**Maintain Record Details**  
To add details to the record select Display after entering dates.  
Begin Date: End Date: Display  
Payroll Record Memo:  
View Employee Rate Summary

Step 9 Select the **Display** button to expand the section.

Step 10 Within the Maintain Record Details section, complete payroll information in the Earnings subsection.

**Maintain Record Details**

Begin Date: 11/14/2020 End Date: 11/27/2020 Display

Payroll Record Memo:

Reported Name and CalPERS ID

CalPERS ID: 1234567890

Last Name: Jones First Name: Emily Middle Name:

**Earnings**

Appointment: Agency Name : Appt Id - 93026248 : 2020-11-14 : Miscellaneous : Regular

Payroll Schedule: Approved - Bi-Weekly : 06/19/1982 -

Transaction Type: Earned Period Reporting

Pay Rate Type: Hourly Pay Rate: \$ 38.55

Reportable Earnings: \$ 693.90

Scheduled Full Time Hours Per Week: 40 Scheduled Full Time Days Per Week: 0.0

Total Hours Worked: 18

Special Compensation: \$0.00 [View Special Compensation](#)

**Contributions**

Taxed Member Paid Contributions: \$ 0.0

Tax Deferred Member Paid Contributions: \$ 0.0

Tax Deferred Employer Paid Member Contributions: \$ 0.0

**Service Credit Purchase Deductions**

Taxed Member Paid Contribution: \$ 0.0

Tax Deferred Member Paid Contribution: \$ 0.0

[Return to View Records page](#) [View Employee Rate Summary](#)

Step 11 Select the **Save and Exit** button.

**You have completed this scenario.**



## Scenario 10: Verify Monthly Pay Rates Over Threshold

CalPERS requires that all pay rates reported over \$20,000 per month be verified by your agency in myCalPERS. In addition, all pay rates reported over \$30,000 per month will require verification by both CalPERS and your agency prior to the payroll records being posted. Once a pay rate is verified, it does **not** need to be re-verified until the pay rate increases by over 5%.

### Step Actions

#### Verify records with monthly pay rates over \$20,000

Step 1 When the monthly pay rate reaches the first threshold (\$20,000), an error code CRB00249 will display at the top of the page.

---

Step 2 A new section displays at the bottom of the payroll record that requires you to select the “I verify the pay rate is in compliance with the Public Employees’ Retirement Law” check box.

| Pay Rate Verification  |              |
|--|--------------|
| <input type="checkbox"/> I verify the pay rate is in compliance with the Public Employees' Retirement Law. | Verified By: |

Step 3 The error will clear, and the payroll record will process. If the pay rate increases by 5%, complete the same steps to re-verify.

---

#### Verify records with monthly pay rates over \$30,000

Step 1 If the monthly pay rate reaches the second threshold, an error code CRB00250 will display at the top of the page.

---

Step 2 A new section displays at the bottom of the payroll record that requires you to select the “I verify the pay rate is in compliance with the Public Employees’ Retirement Law” check box. You must contact CalPERS at **888 CalPERS** (or **888-225-7377**) or email [payrateverification@calpers.ca.gov](mailto:payrateverification@calpers.ca.gov) to review and verify the pay rate.

| Pay Rate Verification  |              |
|--|--------------|
| <input type="checkbox"/> I verify the pay rate is in compliance with the Public Employees' Retirement Law. | Verified By: |
| <input type="checkbox"/> CalPERS Review Completed.   | Verified By: |

**Note:** If you are using the email option, include the member’s name, CalPERS ID, and job title.

---

Step 3 The error will clear, and the payroll record will process. If the pay rate increases by 5%, complete the same steps to re-verify.

**You have completed this scenario.**

---

## Unit 4: Process an Earned Period Payroll Report

Earned period reports must be submitted on or before 30 calendar days following the last day of the earned period.

### Status of Transactions

- **Error** – Record needs to be corrected
- **Pending Validation** – Record has not been validated
- **Valid With Exceptions** – Does not indicate the record has an error, but it could be an issue. You will need to review the exception and verify that the record details are accurate. Example: Name doesn't match the name on the employee's profile; Zero payroll record.
- **Valid But Held** – When there are two records for one employee for the same earned period, but one has an error
- **Valid** – Record has passed the first level of validation and is most likely error free
- **Posted** – Record is error free, and it has posted to the member's account

### Payroll Report Statuses

| Pending Release  | Processing   | Posted  | Suspended   |
|--|--|---|---|
| <ul style="list-style-type: none"><li>• A new report that needs to be validated and posted.</li><li>• The report can be cancelled.</li></ul> | <ul style="list-style-type: none"><li>• The report undergoes a level 2 validation</li><li>• If an error is detected, the report will change from Processing to Suspended status. Delete or correct the error(s), then select the <b>Process Report</b> button to resubmit the report.</li><li>• If no errors are found, the report will change from a Processing to Posted status.</li></ul> | <ul style="list-style-type: none"><li>• All records have posted to the members' accounts.</li><li>• An adjustment is required to correct employees' accounts.</li></ul> | <ul style="list-style-type: none"><li>• Error(s) or arrears detected. You may accept valid records and correct the errors later. Use the <b>Accept Valid Records</b> button once per report.</li><li>• The report can be cancelled if no records have posted.</li><li>• If you delete all remaining errors/arrears records, the report will still have a Suspended status. To reflect a Posted status, select the <b>Process Report</b> button again.</li></ul> |

## Payroll Report Detail Page

Within the Work On Existing Payroll Reports section, select one of the **Earned Period/Adjustment Date** links.

Within the Payroll Report Detail page, the payroll report statistics (number of records reported, posted, unposted, and with errors) of the selected payroll report display.

| Report Details                       |  |  |  |                                |  |  |  |
|--------------------------------------|--|--|--|--------------------------------|--|--|--|
| Report Type: Payroll - Earned Period |  | Earned Period: 12/28/2019 - 01/10/2020 |  | Report Status: Pending Release |  |  |  |
| Program: CalPERS                     |  | Schedule Name:                         |  | Test Report: No                |  |  |  |
| Report Name:                         |  |  |  |                                |  |  |  |

| Report Statistics |                  |                |                  |                     |
|-------------------|------------------|----------------|------------------|---------------------|
|                   | Records Reported | Records Posted | Unposted Records | Records with Errors |
| Total             | 84               | 0              | 84               | 1                   |

| Records Statistics                       |                  |                |                  |                     |
|--|------------------|----------------|------------------|---------------------|
| Record Type                              | Records Reported | Records Posted | Unposted Records | Records with Errors |
| Payroll Record                           | 84               | 0              | 84               | 1                   |
| Service Credit Purchase Deduction Record | 5                | 0              | 5                | 0                   |

| Payroll Report Summary   |                 |                       |                      |                        |                            |                         |                     |
|--|-----------------|-----------------------|----------------------|------------------------|----------------------------|-------------------------|---------------------|
| Uncategorized earnings and contributions can occur in reports in Pending Release status that have not been processed or in reports in Suspended status that have records in error. Total Contributions is the sum of reported contributions and deductions, excluding reported earnings. |                 |                       |                      |                        |                            |                         |                     |
| Rate Plan Identifier   | Member Category | Total Member Earnings | Member Contributions | Employer Contributions | 1959 Survivor Contribution | Service Credit Purchase | Total Contributions |
| 25846  | Safety - Police | \$8,514.46            | \$532.47             | \$1,582.24             | \$0.00                     | \$0.00                  | \$2,114.71          |
| Uncategorized  |                 | \$340,410.35          | \$30,578.74          | \$0.00                 | \$9.30                     | \$331.63                | \$30,919.67         |
| Totals   |                 | \$348,924.81          | \$31,111.21          | \$1,582.24             | \$9.30                     | \$331.63                | \$33,034.38         |

| Generate Report   |  |
|---|--|
| Report Type:  |  |
| <input checked="" type="radio"/> Payroll Record Errors Report |  |
| <input type="radio"/> Payroll Record Exceptions Report        |  |
| <a href="#">Generate Report</a>                               |  |

| Override Report Details  |                      |
|--|----------------------|
| The report name you enter is not saved until you select the Update Report Name button. |                      |
| Report Name:   | <input type="text"/> |
| <a href="#">Update Report Name</a>   |                      |

## Accept Valid Records Button

If the report suspends due to records with errors, you can accept the valid records to post to member accounts then correct and/or delete the error records later. You have 60 days to fix or delete errors to avoid a \$200 late correction fee.

If the report suspends due to arrears, select the **Accept Valid Records** button to post both the valid records and the Arrears Apply- Employer Paid records.

The **Accept Valid Records** button is displayed for specific report types (Earned, Adjustment, and/or Gap), if the report has at least one record with a Valid or Arrears Apply – Employer Paid status, and no records in Posted status (figure below). You may use the **Accept Valid Records** button once per report.

| Report Statistics    |                  |                |                  |                     |
|----------------------|------------------|----------------|------------------|---------------------|
| Accept Valid Records |                  |                |                  |                     |
|                      | Records Reported | Records Posted | Unposted Records | Records with Errors |
| Total                | 615              | 0              | 615              | 2                   |

## Payroll Report Summary

Review the total contributions of a payroll report without having to use the **Generate Report Summary** button to generate a Cognos report.

| Payroll Report Summary   |                 |                       |                      |                        |                            |                         |                     |
|--|-----------------|-----------------------|----------------------|------------------------|----------------------------|-------------------------|---------------------|
| Uncategorized earnings and contributions can occur in reports in Pending Release status that have not been processed or in reports in Suspended status that have records in error. Total Contributions is the sum of reported contributions and deductions, excluding reported earnings. |                 |                       |                      |                        |                            |                         |                     |
| Rate Plan Identifier   | Member Category | Total Member Earnings | Member Contributions | Employer Contributions | 1959 Survivor Contribution | Service Credit Purchase | Total Contributions |
| 25846  | Safety - Police | \$8,514.46            | \$532.47             | \$1,582.24             | \$0.00                     | \$0.00                  | \$2,114.71          |
| Uncategorized  |                 | \$340,410.35          | \$30,578.74          | \$0.00                 | \$9.30                     | \$331.63                | \$30,919.67         |
| <b>Totals</b>  |                 | <b>\$348,924.81</b>   | <b>\$31,111.21</b>   | <b>\$1,582.24</b>      | <b>\$9.30</b>              | <b>\$331.63</b>         | <b>\$33,034.38</b>  |

## Override Report Details

You may give your report a name. Complete the Report Name field, then select the **Update Report Name** button to save the name. Select the **Yes** button to confirm the name. A report name cannot be changed once the report has posted.

| Override Report Details  |                      |
|--|----------------------|
| The report name you enter is not saved until you select the Update Report Name button. |                      |
| <b>Report Name:</b>  | <input type="text"/> |
| <input type="button" value="Update Report Name"/>                                      |                      |

## Cancel Report

You can cancel reports without posted records for the following:

- For file-upload reports: Test or non-test report prior to a new file submission for the same earned period
- Adjustment report created in error
- Copy forwarded report that is pending release or in suspended status

## Generate Report Summary

This is at the bottom left of the page and is used to review a financial data summary of the payroll report in a Cognos report. Refer to scenario 2 of this unit.

[Return to Manage Reports](#)

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## Scenario 1: Process an Earned Period Payroll Report

The **Process Report** button may be accessed through the Payroll Report Detail page or View Payroll Records page which will initiate a series of validations on the records within the report.

### Step Actions

#### Payroll Report Detail Page

Step 1 Select the **Reporting** global navigation tab.

Step 2 Within the Work On Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link.

The screenshot shows the 'Reporting' tab selected in the top navigation bar. Below it, the 'Common Tasks' section includes 'Create or Edit Report' and 'Work On Existing Payroll Reports'. The 'Work On Existing Payroll Reports' section is expanded, showing a table of reports. The table has columns for Schedule Name, Earned Period / Adjustment Date, Status, Report Type, Due Date, Submit Date, Initial Record Posted Date, Report Posted Date, Test Report, and Report Name. The table lists several reports, including 'Payroll - Earned Period' and 'Payroll - Adjustments'.

| Schedule Name | Earned Period / Adjustment Date | Status          | Report Type             | Due Date   | Submit Date | Initial Record Posted Date | Report Posted Date | Test Report | Report Name |
|---------------|---------------------------------|-----------------|-------------------------|------------|-------------|----------------------------|--------------------|-------------|-------------|
|               | 01/23/2021 - 02/05/2021         | Pending Release | Payroll - Earned Period | 03/07/2021 | 01/29/2021  | 11/30/2020                 | 11/30/2020         | No          | Port of Oc  |
|               | 11/30/2020 - 11/30/2020         | Posted          | Payroll - Adjustments   |            | 11/30/2020  | 11/30/2020                 |                    | No          | Port_Nov    |
|               | 11/30/2020 - 11/30/2020         | Posted          | Payroll - Adjustments   |            | 11/30/2020  | 11/30/2020                 |                    | No          | External t  |
|               | 11/16/2020 - 11/16/2020         | Posted          | Payroll - Adjustments   |            | 11/16/2020  | 11/16/2020                 |                    | No          | Port _ No   |
|               | 11/16/2020 - 11/16/2020         | Posted          | Payroll - Adjustments   |            | 11/16/2020  | 11/16/2020                 |                    | No          | Port_Nov    |
|               | 11/14/2020 - 11/27/2020         | Pending Release | Payroll - Earned Period | 12/27/2020 | 01/29/2021  |                            |                    | No          |             |
|               | 11/03/2020 - 11/03/2020         | Posted          | Payroll - Adjustments   |            | 11/03/2020  | 11/03/2020                 |                    | No          | Port of Oc  |
|               | 11/03/2020 - 11/03/2020         | Posted          | Payroll - Adjustments   |            | 11/03/2020  | 11/03/2020                 |                    | No          | Port_Oct    |
|               | 10/31/2020 - 11/13/2020         | Posted          | Payroll - Earned Period | 12/13/2020 | 11/25/2020  | 11/30/2020                 | 11/30/2020         | No          |             |
|               | 10/19/2020 - 10/19/2020         | Posted          | Payroll - Adjustments   |            | 10/19/2020  | 10/19/2020                 | 10/19/2020         | No          | Port _ Oct  |
|               | 10/19/2020 - 10/19/2020         | Posted          | Payroll - Adjustments   |            | 10/19/2020  | 10/19/2020                 | 10/19/2020         | No          | Port _ Oc   |

Step 3 From the Payroll Report Detail page, select the **Process Report** button.

The screenshot shows the 'Override Report Details' section. It contains a text input field for 'Report Name' and an 'Update Report Name' button. Below this, there are three buttons: 'Process Report' (highlighted with a red box), 'Cancel Report', and 'Generate Report Summary'. A 'View Records' link is also visible on the right.

Step 4 Select the **Yes** button under the Confirmation Page section to confirm the request to process the report.

The screenshot shows the 'Confirmation Page' section. It contains a text input field for 'Do you want to process this report?' and two buttons: 'Yes' and 'No'.

Step 5 Select the **Save & Exit** button.

**You have completed this scenario.**

## View Payroll Records Page

Step 1 Select the **Reporting** global navigation tab.

Step 2 Within the Work On Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link.

The screenshot shows the CalPERS Reporting interface. The top navigation bar includes 'Home', 'Profile', 'Reporting' (selected), 'Person Information', 'Education', and 'Other Organizations'. Below this, a secondary bar lists various reporting functions. The main content area is titled 'Work On Existing Payroll Reports' and includes a table of payroll reports. The table has columns for Schedule Name, Earned Period / Adjustment Date, Status, Report Type, Due Date, Submit Date, Initial Record Posted Date, Report Posted Date, Test Report, and Report Name. The table lists several reports, including 'Payroll - Earned Period' and 'Payroll - Adjustments'.

| Schedule Name           | Earned Period / Adjustment Date | Status          | Report Type             | Due Date   | Submit Date | Initial Record Posted Date | Report Posted Date | Test Report | Report Name |
|-------------------------|---------------------------------|-----------------|-------------------------|------------|-------------|----------------------------|--------------------|-------------|-------------|
| 01/23/2021 - 02/05/2021 |                                 | Pending Release | Payroll - Earned Period | 03/07/2021 | 01/29/2021  |                            |                    | No          |             |
| 11/30/2020 - 11/30/2020 |                                 | Posted          | Payroll - Adjustments   |            | 11/30/2020  | 11/30/2020                 | 11/30/2020         | No          | Port of Oc  |
| 11/30/2020 - 11/30/2020 |                                 | Posted          | Payroll - Adjustments   |            | 11/30/2020  | 11/30/2020                 | 11/30/2020         | No          | Port_Nov    |
| 11/30/2020 - 11/30/2020 |                                 | Posted          | Payroll - Adjustments   |            | 11/30/2020  | 11/30/2020                 | 11/30/2020         | No          | External t  |
| 11/16/2020 - 11/16/2020 |                                 | Posted          | Payroll - Adjustments   |            | 11/16/2020  | 11/16/2020                 | 11/16/2020         | No          | Port _ No   |
| 11/16/2020 - 11/16/2020 |                                 | Posted          | Payroll - Adjustments   |            | 11/16/2020  | 11/16/2020                 | 11/16/2020         | No          | Port_Nov    |
| 11/14/2020 - 11/27/2020 |                                 | Pending Release | Payroll - Earned Period | 12/27/2020 | 01/29/2021  |                            |                    | No          |             |
| 11/03/2020 - 11/03/2020 |                                 | Posted          | Payroll - Adjustments   |            | 11/03/2020  | 11/03/2020                 | 11/03/2020         | No          | Port of Oc  |
| 11/03/2020 - 11/03/2020 |                                 | Posted          | Payroll - Adjustments   |            | 11/03/2020  | 11/03/2020                 | 11/03/2020         | No          | Port_Oct    |
| 10/31/2020 - 11/13/2020 |                                 | Posted          | Payroll - Earned Period | 12/13/2020 | 11/25/2020  | 11/30/2020                 | 11/30/2020         | No          |             |
| 10/19/2020 - 10/19/2020 |                                 | Posted          | Payroll - Adjustments   |            | 10/19/2020  | 10/19/2020                 | 10/19/2020         | No          | Port _Oct   |
| 10/19/2020 - 10/19/2020 |                                 | Posted          | Payroll - Adjustments   |            | 10/19/2020  | 10/19/2020                 | 10/19/2020         | No          | Port _ Oc   |

Step 3 Select the **View Records** link at the bottom right of the page to access the records within the report

The screenshot shows the 'Override Report Details' section. It includes a text input field for 'Report Name' and an 'Update Report Name' button. Below this, there are three buttons: 'Process Report', 'Cancel Report', and 'Generate Report Summary'. A red box highlights the 'View Records' link at the bottom right.

[View Records](#)

Step 4 Select the **Process Report** button.

The screenshot shows a list of records with pagination controls. Below the list, there are buttons for 'Process Report' and 'Generate Report Summary'. A red box highlights the 'View Payroll Report Summary' link at the bottom right.

[View Payroll Report Summary](#)

Step 5 Select the **Yes** button under the Confirmation Page section to confirm the request to process the report.

The screenshot shows the 'Confirmation Page' with the question 'Do you want to process this report?'. There are two buttons: 'Yes' and 'No'.

You have completed this scenario.

## Scenario 2: The Error List, Payroll Exception, and Payroll Summary Reports

Within the Payroll Report Detail page, you will run three reports:

- Error List Report: Lists the records with errors and error descriptions. File upload reporters use this report to identify the records with errors that need to be corrected or deleted.
- Payroll Exception Report: Lists the records with a Valid with Exception status and the exception descriptions
- Payroll Report Summary: Lists the report statistics and financial summary for the earned period report. You may select the **Earned Period/Payroll Adjustment Date** link to review the Contribution Detail Report.

### System Logic

The Error List Report and the Payroll Exception Report will not retrieve pending validation and suspended records. Before running these reports, you need to validate each record (open the record and save) to update the status from Pending Validation.

### Step Actions

Step 1 Select the **Reporting** global navigation tab.

Step 2 Within the Work On Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link.

The screenshot displays the CalPERS Reporting interface. The top navigation bar includes tabs for Home, Profile, Reporting (selected), Person Information, Education, and Other Organizations. Below this, a sub-navigation bar lists various reporting options: Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, Member Requests, Health Reconciliation, and Retirement Appointment Reconciliation. The main content area is titled 'Create or Edit Report' and includes a 'Method' dropdown menu. Below this, the 'Work On Existing Payroll Reports' section is visible, showing a table of reports. The table has columns for Schedule Name, Earned Period / Adjustment Date, Status, Report Type, Due Date, Submit Date, Initial Record Posted Date, Report Posted Date, Test Report, and Report Name. The table lists several reports, including 'Retirement Contract Summary', 'Maintain DA Deductions', 'Current DA Errors', 'Unresolved Historical DA Errors', and 'Maintain Employer Supporting Documents'. The 'Status' column shows various statuses like 'Pending Release', 'Posted', and 'Pending Release'. The 'Report Type' column shows 'Payroll - Earned Period' and 'Payroll - Adjustments'. The 'Due Date' column shows dates like '03/07/2021' and '12/13/2020'. The 'Submit Date' column shows dates like '01/29/2021' and '11/16/2020'. The 'Initial Record Posted Date' column shows dates like '11/30/2020' and '11/16/2020'. The 'Report Posted Date' column shows dates like '11/30/2020' and '11/16/2020'. The 'Test Report' column shows 'No' for all entries. The 'Report Name' column shows various report names like 'Port of Oc', 'Port\_Nov', 'Port\_No', 'Port\_Oct', and 'Port\_Oc'.

| Schedule Name                          | Earned Period / Adjustment Date | Status          | Report Type             | Due Date   | Submit Date | Initial Record Posted Date | Report Posted Date | Test Report | Report Name |
|--|---------------------------------|-----------------|-------------------------|------------|-------------|----------------------------|--------------------|-------------|-------------|
| Retirement Contract Summary            | 01/23/2021 - 02/05/2021         | Pending Release | Payroll - Earned Period | 03/07/2021 | 01/29/2021  | 11/30/2020                 | 11/30/2020         | No          | Port of Oc  |
| Maintain DA Deductions                 | 11/30/2020 - 11/30/2020         | Posted          | Payroll - Adjustments   |            | 11/30/2020  | 11/30/2020                 | 11/30/2020         | No          | Port_Nov    |
| Current DA Errors                      | 11/30/2020 - 11/30/2020         | Posted          | Payroll - Adjustments   |            | 11/30/2020  | 11/30/2020                 | 11/30/2020         | No          | External c  |
| Unresolved Historical DA Errors        | 11/16/2020 - 11/16/2020         | Posted          | Payroll - Adjustments   |            | 11/16/2020  | 11/16/2020                 | 11/16/2020         | No          | Port_No     |
| Maintain Employer Supporting Documents | 11/14/2020 - 11/27/2020         | Pending Release | Payroll - Earned Period | 12/27/2020 | 01/29/2021  | 11/16/2020                 | 11/16/2020         | No          | Port_Oct    |
|  | 11/03/2020 - 11/03/2020         | Posted          | Payroll - Adjustments   |            | 11/03/2020  | 11/03/2020                 | 11/03/2020         | No          | Port of Oc  |
|  | 11/03/2020 - 11/03/2020         | Posted          | Payroll - Adjustments   |            | 11/03/2020  | 11/03/2020                 | 11/03/2020         | No          | Port_Oct    |
|  | 10/31/2020 - 11/13/2020         | Posted          | Payroll - Earned Period | 12/13/2020 | 11/25/2020  | 11/30/2020                 | 11/30/2020         | No          | Port_Oc     |
|  | 10/19/2020 - 10/19/2020         | Posted          | Payroll - Adjustments   |            | 10/19/2020  | 10/19/2020                 | 10/19/2020         | No          | Port_Oc     |
|  | 10/19/2020 - 10/19/2020         | Posted          | Payroll - Adjustments   |            | 10/19/2020  | 10/19/2020                 | 10/19/2020         | No          | Port_Oc     |

Step 3 If you want to run the:

- Error List Report or the Payroll Exception Report, continue to step 4
- Payroll Summary Report, skip to step 6

Step 4

Within the Generate Report section, select the **Payroll Record Errors Report** or the **Payroll Record Exceptions Report** radio button.

**Report Details**  
Report Type: Payroll - Earned Period  
Program: CalPERS  
Report Name:  
Earned Period: 04/16/2022 - 04/29/2022  
Schedule Name:  
Report Status: Suspended  
Test Report: No

**Report Statistics**  
Accept Valid Records  

|       | Records Reported | Records Posted | Unposted Records | Records with Errors |
|-------|------------------|----------------|------------------|---------------------|
| Total | 100              | 0              | 100              | 4                   |

**Records Statistics**  

| Record Type                              | Records Reported | Records Posted | Unposted Records | Records with Errors |
|--|------------------|----------------|------------------|---------------------|
| Payroll Record                           | 100              | 0              | 100              | 4                   |
| Service Credit Purchase Deduction Record | 6                | 0              | 6                | 0                   |

**Payroll Report Summary**  
Uncategorized earnings and contributions can occur in reports in Pending Release status that have not been processed or in reports in Suspended status that have records in error. Total Contributions is the sum of reported contributions and deductions, excluding reported earnings.  

| Rate Plan Identifier | Member Category | Total Member Earnings | Member Contributions | Employer Contributions | 1959 Survivor Contribution | Service Credit Purchase | Total Contributions |
|----------------------|-----------------|-----------------------|----------------------|------------------------|----------------------------|-------------------------|---------------------|
| 899                  | Miscellaneous   | \$134,634.92          | \$9,589.09           | \$14,203.84            | \$0.00                     | \$69.40                 | \$23,862.33         |
| 900                  | Safety - Police | \$84,426.97           | \$10,742.56          | \$12,846.34            | \$8.37                     | \$407.32                | \$24,004.59         |
| 25845                | Safety - Fire   | \$23,491.16           | \$3,053.86           | \$4,214.31             | \$3.72                     | \$0.00                  | \$7,271.89          |
| 25846                | Safety - Police | \$30,582.12           | \$3,669.86           | \$5,792.23             | \$0.00                     | \$0.00                  | \$9,462.09          |
| 27415                | Miscellaneous   | \$119,293.82          | \$8,648.80           | \$14,136.31            | \$0.00                     | \$114.43                | \$22,899.54         |
| Uncategorized        |                 | \$4,913.72            | \$479.07             | \$0.00                 | \$0.00                     | \$0.00                  | \$479.07            |
| Totals               |                 | \$397,342.71          | \$36,183.24          | \$51,193.03            | \$12.09                    | \$591.15                | \$87,979.51         |

**Generate Report**  
Report Type:  
☒ Payroll Record Errors Report  
☐ Payroll Record Exceptions Report  
Generate Report

**Override Report Details**  
The report name you enter is not saved until you select the Update Report Name button.  
Report Name:   
Update Report Name

Process Report Cancel Report Generate Report Summary [View Records](#)

Step 5

Select the **Generate Report** button.

Step 6

At the bottom of the page, select the **Generate Report Summary** button to access the Payroll Report Summary as a Cognos report.

**You have completed this scenario.**



## Unit 5: Reconcile Unposted Payroll Records

You will use the **Payroll Schedule** local navigation link to reconcile your appointments that are missing payroll by earned period.

For each posted earned period report, a list of appointments that did not have payroll reported displays for you to confirm the unposted payroll.

### System Logic

- In lieu of using the **Confirm Unposted Payroll** button, report zero payroll to proactively address when an employee has no earnings (refer to unit 3, scenario 4).
- Transactions completed outside of the Payroll Schedule page (e.g., posting payroll adjustment records or updating their appointment) will update the list after a nightly batch.

### Best Practices

- Save time by waiting to reconcile your payroll until at least one day after your payroll report posts, because only the appointments missing payroll will display.
- After payroll has been reconciled, continue to check if the **View** link displays under the Participants with Unposted Payroll column due to a retroactive new enrollment.
- If you have the Business Partner Retirement Enrollment access role, you may use the **Maintain Enrollment** button to update an appointment (refer to the [myCalPERS Retirement Appointment Reconciliation \(PDF\)](#) student guide, unit 2).

### Scenario

You will review the active appointments with no payroll for an earned period. You will verify and confirm unposted payroll for employees who didn't have any pay during this period.

### Step Actions

Step 1 Select the **Reporting** global navigation tab.

Step 2 Select the **Payroll Schedule** local navigation link.

Step 3 Within the **Existing Payroll Schedules** section, select the appropriate payroll schedule **View Periods** link.

| Type      | Name | Begin Date | End Date | Status   | View Periods                 | View More Actions |
|-----------|------|------------|----------|----------|------------------------------|-------------------|
| Bi-Weekly |      | 06/19/1982 |          | Approved | <a href="#">View Periods</a> |                   |

Step 4 Within the Payroll Periods section, select the appropriate Fiscal Year from the drop-down list.

| Earned Period         | Report Due Date | Report Submitted | Report Post Date | Report Status | Extension Status | Exemption Status | Participants with Unposted Payroll |
|-----------------------|-----------------|------------------|------------------|---------------|------------------|------------------|------------------------------------|
| 06/12/2021-06/25/2021 | 07/25/2021      |                  |                  |               |                  |                  |                                    |
| 05/29/2021-06/11/2021 | 07/11/2021      |                  |                  |               |                  |                  |                                    |
| 05/15/2021-05/28/2021 | 06/27/2021      |                  |                  |               |                  |                  |                                    |
| 05/01/2021-05/14/2021 | 06/13/2021      |                  |                  |               |                  |                  |                                    |
| 04/17/2021-04/30/2021 | 05/30/2021      |                  |                  |               |                  |                  |                                    |
| 04/03/2021-04/16/2021 | 05/16/2021      |                  |                  |               |                  |                  |                                    |
| 03/20/2021-04/02/2021 | 05/02/2021      |                  |                  |               |                  |                  |                                    |
| 03/06/2021-03/19/2021 | 04/18/2021      |                  |                  |               |                  |                  |                                    |

Step 5 Select the **Display** button.

Step 6 Under the Participants with Unposted Payroll column, select the appropriate **View** link.

| Earned Period         | Report Due Date | Report Submitted | Report Post Date | Report Status   | Extension Status | Exemption Status | Participants with Unposted Payroll |
|-----------------------|-----------------|------------------|------------------|-----------------|------------------|------------------|------------------------------------|
| 06/12/2021-06/25/2021 | 07/25/2021      |                  |                  |                 |                  |                  |                                    |
| 05/29/2021-06/11/2021 | 07/11/2021      |                  |                  |                 |                  |                  |                                    |
| 05/15/2021-05/28/2021 | 06/27/2021      |                  |                  |                 |                  |                  |                                    |
| 05/01/2021-05/14/2021 | 06/13/2021      |                  |                  |                 |                  |                  |                                    |
| 04/17/2021-04/30/2021 | 05/30/2021      |                  |                  |                 |                  |                  |                                    |
| 04/03/2021-04/16/2021 | 05/16/2021      |                  |                  |                 |                  |                  |                                    |
| 03/20/2021-04/02/2021 | 05/02/2021      |                  |                  |                 |                  |                  |                                    |
| 03/06/2021-03/19/2021 | 04/18/2021      |                  |                  |                 |                  |                  |                                    |
| 02/20/2021-03/05/2021 | 04/04/2021      |                  |                  |                 |                  |                  |                                    |
| 02/06/2021-02/19/2021 | 03/21/2021      |                  |                  |                 |                  |                  |                                    |
| 01/23/2021-02/05/2021 | 03/07/2021      |                  |                  |                 |                  |                  |                                    |
| 01/09/2021-01/22/2021 | 02/21/2021      |                  |                  |                 |                  |                  |                                    |
| 12/26/2020-01/08/2021 | 02/07/2021      | 01/29/2021       |                  | Suspended       |                  |                  | <a href="#">View</a>               |
| 12/12/2020-12/25/2020 | 01/24/2021      |                  |                  |                 |                  |                  | <a href="#">View</a>               |
| 11/28/2020-12/11/2020 | 01/10/2021      |                  |                  |                 |                  |                  | <a href="#">View</a>               |
| 11/14/2020-11/27/2020 | 12/27/2020      | 01/29/2021       |                  | Pending Release |                  |                  | <a href="#">View</a>               |

**Note:** The **View** link displays under the Participants with Unposted payroll column when there are appointments to reconcile. **View** links will display for future earned periods because none of those employees have posted payroll yet.

Step 7 The Search for Participants with Unposted Payroll section can be used to filter the list. If filters aren't used, continue to the Participants with Unposted Payroll section.

**Unposted Payroll Reconciliation**

Earned Period: 11/14/2020 - 11/27/2020 Total Number of Appointments Listed: 77

**Search for Participants with Unposted Payroll**

Program: CalPERS

Last Name:

SSN:

Member Category/ Rate Plan:

Appt Status:

Participant CalPERS ID:

Member Account Status:

Retired Annuitant:

- Step 8 Select the appropriate **Participant CalPERS ID** check boxes for the employees you wish to confirm unposted payroll.

**Unposted Payroll Reconciliation**

Earned Period: 11/14/2020 - 11/27/2020 Total Number of Appointments Listed: 77

**Search for Participants with Unposted Payroll**

Program: CalPERS  
Last Name:   
SSN:   
Member Category/ Rate Plan:   
Appt Status:   
Participant CalPERS ID:   
Member Account Status:   
Retired Annuitant:   
Search Clear

**Participants with Unposted Payroll**

Payroll has not been posted for the following participants. Please report payroll or select the applicable appointments to confirm payroll is not reportable or maintain the enrollment.

Select All  
Maintain Enrollment Confirm Unposted Payroll

Show 25 entries  
Showing 1 to 22 of 22 entries

| Participant CalPERS ID   | Name                                | Appt ID  | Appt Status | Member Account Status | Retired Annuitant | Last Reported Payroll Record Status | Rate Plan | Projected Member Contributions | Projected Employer Contributions |
|--------------------------|-------------------------------------|----------|-------------|-----------------------|-------------------|-------------------------------------|-----------|--------------------------------|----------------------------------|
| <input type="checkbox"/> | 3990352869 AL ROOMI, JASON S, L.    | 92624104 | Active      | Active                | No                | Posted                              | 27415     | \$0.00                         | \$0.00                           |
| <input type="checkbox"/> | 5919418709 BOURGES, CHI THAO A.     | 92905905 | Active      | Active                | No                | Posted                              | 27415     | \$0.00                         | \$0.00                           |
| <input type="checkbox"/> | 4582492470 FRANCO MURILLO, NORAHNNA | 21020680 | Active      | Active                | No                | Posted                              | 900       | \$0.00                         | \$0.00                           |

- Maintaining the appointments or confirming missing payroll records within the Payroll Schedule pages automatically updates the list.
- An employee with an On Leave appointment event will not be on the Retirement Appointment Reconciliation list if the leave:
  - Is less than six months
  - Has an end leave date, regardless of how long the leave is

Step 9 Select the **Confirm Unposted Payroll** button.

**You have completed this scenario.**

## Unit 6: Add Payroll Schedules

Changes in the earned period dates must be approved by CalPERS in advance. After CalPERS approves a new payroll schedule, you will receive a letter, and then you may report payroll using the new schedule.

### Scenario

You will request a new payroll schedule such as monthly, semi-monthly, bi-weekly, or quadri-weekly.

### Step Actions

Step 1 Select the **Reporting** global navigation tab.

Step 2 Select the **Payroll Schedule** local navigation link.

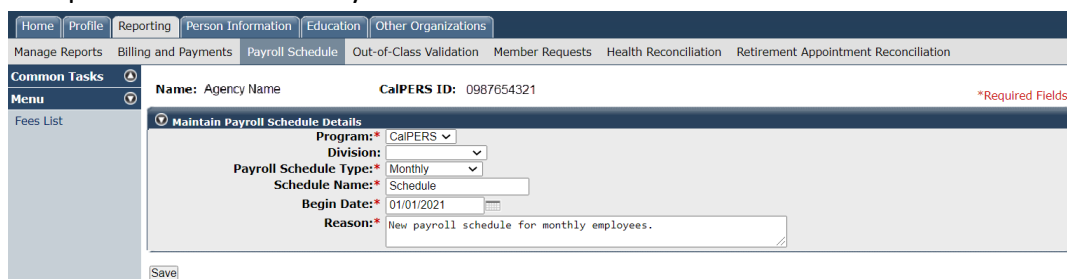
Step 3 Within the Payroll Schedule Options section, select the **Add New Payroll Schedule** radio button.



The screenshot shows the 'Payroll Schedule Options' section of the CalPERS system. The top navigation bar includes 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. Below this, a sub-navigation bar lists 'Manage Reports', 'Billing and Payments', 'Payroll Schedule', 'Out-of-Class Validation', 'Member Requests', 'Health Reconciliation', and 'Retirement Appointment Reconciliation'. The 'Payroll Schedule' link is highlighted. On the left, a 'Common Tasks' menu shows 'Fees List'. The main content area displays 'Name: Agency Name' and 'CalPERS ID: 0987654321' with a red asterisk indicating required fields. Below this, the 'Payroll Schedule Options' section contains a 'Method:' label and three radio buttons: 'Add New Payroll Schedule' (selected), 'Request Extension for Existing Payroll Schedule', and 'Request Exemption for Non-Reportable Payroll Earned Period'. A 'Continue' button is at the bottom.

Step 4 Select the **Continue** button.

Step 5 Complete the Maintain Payroll Schedule Details section.



The screenshot shows the 'Maintain Payroll Schedule Details' section of the CalPERS system. The top navigation bar and sub-navigation bar are the same as in the previous screenshot. The 'Payroll Schedule' link is highlighted. On the left, the 'Common Tasks' menu shows 'Fees List'. The main content area displays 'Name: Agency Name' and 'CalPERS ID: 0987654321' with a red asterisk indicating required fields. Below this, the 'Maintain Payroll Schedule Details' section contains several fields: 'Program:' (dropdown menu showing 'CalPERS'), 'Division:' (dropdown menu), 'Payroll Schedule Type:' (dropdown menu showing 'Monthly'), 'Schedule Name:' (text input field showing 'Schedule'), 'Begin Date:' (date picker showing '01/01/2021'), and 'Reason:' (text input field showing 'New payroll schedule for monthly employees.'). A 'Save' button is at the bottom.

Step 6 Select the **Save** button.

**You have completed this scenario.**

## Unit 7: Request Due-Date Extension for an Earned Payroll Report

You may request a payroll extension through myCalPERS. Payroll extension requests must be made at least 10 business days prior to the payroll due date and no more than 30 days before the due date. Otherwise, myCalPERS will not provide an extension request option.

### Waiver

If myCalPERS does not provide an extension request option and a late fee has been assessed for the selected earned period, you may request a waiver of penalties through the waiver request and dispute process. From the **Reporting** tab, select **Payroll Schedule** local navigation link, and then the **Fees List** left-side link. Select the **Fee ID** link, and then at the bottom of the page, enter your appeal reason. Once submitted, the status of the appeal is displayed under the Appeal Status column.

### Scenario

You will submit an extension request for an earned period existing payroll schedule through myCalPERS.

### Step Actions

Step 1 Select the **Reporting** global navigation tab.

---

Step 2 Select the **Payroll Schedule** local navigation link.

---

Step 3 Within the Payroll Schedule Options section, select the **Request Extension for Existing Payroll Schedule** radio button.

The screenshot shows the myCalPERS interface. At the top, there are tabs: Home, Profile, Reporting (selected), Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule (selected), Out-of-Class Validation, Member Requests, Health Reconciliation, and Retirement Appointment Reconciliation. The main content area is titled 'Payroll Schedule Options'. It has a 'Method:' section with three radio buttons: 'Add New Payroll Schedule', 'Request Extension for Existing Payroll Schedule' (which is selected), and 'Request Exemption for Non-Reportable Payroll Earned Period'. Below this is a 'Continue' button. There is also a 'Select A Program' section with a dropdown menu showing 'CalPERS' and a 'Display' button. The left sidebar shows 'Common Tasks' and 'Menu' with 'Fees List' selected.

Step 4 Select the **Continue** button.

---

Step 5 Complete the Maintain Reporting Extension section.

The screenshot shows the 'Maintain Reporting Extension' form. It has a 'Program:' dropdown menu set to 'CalPERS'. Below this are several fields: 'Payroll Schedule Type:' with a dropdown arrow, 'Earned Period:' with a dropdown arrow, 'Report Due Date:' with a date picker, 'Requested Extension Date:' with a text input field, 'Approved Extension Date:' with a text input field, and 'Reason for Extension:' with a text area. At the bottom left is a 'Save' button, and at the bottom right is a 'View Periods' link.

Step 6 Select the **Save** button.

---

## Step 7

Review the status of your request under the **Extension Status** column.

| Payroll Periods        |                 |                  |                  |               |                  |                  |                                    |
|------------------------|-----------------|------------------|------------------|---------------|------------------|------------------|------------------------------------|
| Fiscal Year: 2019/2020 |                 | Display          |                  |               |                  |                  |                                    |
| Earned Period          | Report Due Date | Report Submitted | Report Post Date | Report Status | Extension Status | Exemption Status | Participants with Unposted Payroll |
| 06/13/2020-06/26/2020  | 07/26/2020      |                  |                  |               |                  |                  |                                    |
| 05/30/2020-06/12/2020  | 07/12/2020      |                  |                  |               |                  |                  |                                    |
| 05/16/2020-05/29/2020  | 06/28/2020      |                  |                  |               |                  |                  |                                    |
| 05/02/2020-05/15/2020  | 06/14/2020      |                  |                  |               |                  |                  |                                    |
| 04/18/2020-05/01/2020  | 05/31/2020      |                  |                  |               |                  |                  |                                    |
| 04/04/2020-04/17/2020  | 05/17/2020      |                  |                  |               |                  |                  |                                    |
| 03/21/2020-04/03/2020  | 05/03/2020      |                  |                  |               |                  |                  |                                    |
| 03/07/2020-03/20/2020  | 04/19/2020      |                  |                  |               | Pending Approval |                  |                                    |
| 02/22/2020-03/06/2020  | 04/05/2020      |                  |                  |               | Pending Approval |                  |                                    |
| 02/08/2020-02/21/2020  | 03/22/2020      |                  |                  |               |                  |                  | <a href="#">View</a>               |
| 01/25/2020-02/07/2020  | 03/08/2020      |                  |                  |               |                  |                  | <a href="#">View</a>               |
| 01/11/2020-01/24/2020  | 02/23/2020      |                  |                  |               |                  |                  | <a href="#">View</a>               |
| 12/28/2019-01/10/2020  | 02/09/2020      |                  |                  |               |                  |                  | <a href="#">View</a>               |
| 12/14/2019-12/27/2019  | 01/26/2020      | 01/08/2020       | 01/10/2020       | Posted        |                  |                  |                                    |
| 11/30/2019-12/13/2019  | 01/12/2020      | 12/26/2019       | 12/30/2019       | Posted        |                  |                  |                                    |
| 11/16/2019-11/29/2019  | 12/29/2019      | 12/12/2019       | 12/16/2019       | Posted        |                  |                  |                                    |
| 11/02/2019-11/15/2019  | 12/15/2019      | 11/26/2019       | 11/27/2019       | Posted        |                  |                  |                                    |
| 10/19/2019-11/01/2019  | 12/01/2019      | 11/14/2019       | 11/18/2019       | Posted        |                  |                  |                                    |
| 10/05/2019-10/18/2019  | 11/17/2019      | 10/31/2019       | 11/01/2019       | Posted        |                  |                  |                                    |
| 09/21/2019-10/04/2019  | 11/03/2019      | 10/18/2019       | 10/25/2019       | Posted        |                  |                  |                                    |
| 09/07/2019-09/20/2019  | 10/20/2019      | 10/08/2019       | 10/11/2019       | Posted        |                  |                  |                                    |
| 08/24/2019-09/06/2019  | 10/06/2019      | 09/19/2019       | 09/30/2019       | Posted        |                  |                  |                                    |
| 08/10/2019-08/23/2019  | 09/22/2019      | 09/17/2019       | 09/18/2019       | Posted        |                  |                  |                                    |
| 07/27/2019-08/09/2019  | 09/08/2019      | 08/21/2019       | 08/23/2019       | Posted        |                  |                  |                                    |
| 07/13/2019-07/26/2019  | 08/25/2019      | 08/08/2019       | 08/19/2019       | Posted        |                  |                  |                                    |
| 06/29/2019-07/12/2019  | 08/11/2019      | 07/31/2019       | 08/05/2019       | Posted        |                  |                  |                                    |
| Display                |                 |                  |                  |               |                  |                  |                                    |

**Note:** Within 2-5 business days, the **Extension Status** column will reflect Approved or Rejected.

**You have completed this scenario.**

## CalPERS Resources

Obtain more information by visiting the [CalPERS website](http://www.calpers.ca.gov) at [www.calpers.ca.gov](http://www.calpers.ca.gov).

- [myCalPERS Student Guides & Resources](#)  
**Pathway:** CalPERS website > Employers > I Want To...: Access myCalPERS Student Guides
- [Business Rules & myCalPERS Classes](#)  
**Pathway:** CalPERS website > Employers > I Want To...: Attend Training & Events > Business Rules & myCalPERS Classes
- [myCalPERS Technical Requirements](#)  
**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements
- [Public Agency & Schools Reference Guide \(PDF\)](#)  
**Pathway:** CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- [Circular Letters](#)  
**Pathway:** CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law \(PERL\)](#)  
**Pathway:** CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)
- [myCalPERS Employer Reports \(Cognos\) Catalog](#)  
**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog  
Some common reports that are run for payroll:
  - Collective Outstanding Payroll Error Report
  - Collective Outstanding Payroll Exception Report
  - Contribution Summary for a Fiscal Year Report
  - Reported Compensation by Calendar Year Detail Report
  - Reported Compensation by Calendar Year Summary Report
  - Reported Member Summary Report
  - Reported Member Detail Report
  - To view a list of employees at risk of permanent separation due to unposted payroll:
    - Business Partner Info Report
    - Participant Appointment Details Report
    - Business Partner On Leave Report

# CalPERS Contacts

## Email

- To contact the [Employer Educators](#) for questions and inquiries, email **calpers\_employer\_communications@calpers.ca.gov**.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email **ert@calpers.ca.gov**.
- To contact [CalPERS Membership Unit](#) for questions regarding membership eligibility or if a non-contributory employee does not have the Earned Period No Contribution and No Service in the Transaction Type drop-down list, email **membership\_reporting@calpers.ca.gov**.
- To contact the [Compensation Compliance & Review Unit](#) for special compensation questions and inquiries, email **mou\_review@calpers.ca.gov**.

## Phone or Fax

You can reach CalPERS at **888 CalPERS** (or **888-225-7377**), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

## Submit Inquiry

You can send secure messages through myCalPERS. Expand the **Common Tasks** left-side navigation folder and select the **Submit Inquiry** link to submit a question or request.